

Genuine U.S. Mint Recognition Wave II Study

-- Draft Final Report --

prepared for



December, 2003



**NATIONAL ANALYSTS
RESEARCH & CONSULTING**

©2003 National Analysts, Inc.

An unpublished work

All rights reserved

Table of Contents...

	<u>Page</u>
Executive Summary.....	i - v
Background & Objectives	2
Methodology	5
U.S. Mint Customer & Non-Customer Profile	15
Recognition of the U.S. Mint & Competitors.....	25
Attitudes Toward the U.S. Mint & Competitors' Products.....	43
Attitudes Towards Coins & Coin Collecting.....	49
Coin & Coin-Related Behaviors.....	58
Q50 Awareness, Attitudes & Behaviors	67
Conclusions & Recommendations	81
Glossary.....	84
Appendix	85

Executive Summary...

I. Background & Objectives

In the face of revenue declines in 2001 and 2002, the U.S. Mint launched an aggressive advertising campaign designed to bolster its recognition as a high quality provider of U.S. coins. Aside from increasing its recognition, the U.S. Mint initiated its "genuine" program to revitalize coin collecting and plant the seeds for more sustained sales growth. In this context, the U.S. Mint commissioned National Analysts to measure the campaign's effectiveness; namely, to determine if its brand identity is being strengthened and interest in coin collecting is rising as intended.

II. Methodology

Three sampling frames -- those previously interviewed, U.S. Mint customers, and a Random Digit Dial (RDD) list -- were used to identify customers and non-customers for this first follow-up. In the four-week period following the end of the summer 2003 ads, more than 1,500 computer-assisted telephone interviews were completed. The questionnaire, developed in conjunction with the U.S. Mint research team, was nearly identical to the Benchmark Survey, with a few advertising recall questions added. The follow-up survey analysis focuses on changes in awareness, attitudes, and behaviors related to coins, coin collecting, and the U.S. Mint and its competitors, including its Q50 program.

III. U.S. Mint Customer & Non-Customer Profile

The demographics of U.S. Mint customers compared to those in the Benchmark Survey and Non-U.S. Mint customers remain relatively unchanged. News, educational, science or nature, home & garden, and sports magazines are favored by both U.S. Mint and Non-U.S. Mint customers as was the case in the Benchmark Survey. There have been no changes in the newspaper reading habits of either U.S. Mint customers or Non-U.S. Mint customers -- nearly everyone claims to read one paper regularly. News programs remain the type of program most watched by U.S. Mint customers and Non-U.S. Mint customers; educational and sports programs are more prevalent among U.S. Mint customers while movies (not sports) are the choice of non-customers. Access to and viewing of cable TV has remained high in this first follow-up survey; in fact, some growth in access is evident among higher spending U.S. Mint customers. The Discovery and History channels remain the favorites of U.S. Mint customers, while Lifetime is clearly a more preferred choice among Non-U.S. Mint customers.

Radio listening has increased slightly from the Benchmark Survey among U.S. Mint customers and not changed for Non-U.S. Mint customers. Access to the Internet and the frequency of using at least one key website a lot remains higher among U.S. Mint customers than Non-U.S. Mint customers. Compared to Non-U.S. Mint customers, U.S. Mint customers with Internet access are more likely to visit news and financial web sites as observed in the Benchmark Survey.

IV. Recognition of the U.S. Mint & Competitors

Over the past year, there has been an increase in the percentage of U.S. Mint customers who believe they have seen U.S. Mint advertising on the internet and in newspapers, although one-half of "TV recall" customers do not remember which channels had such ads. Similarly, a large percentage of both U.S. Mint and Non-U.S. Mint customers do not remember the name of the magazine in which they saw a U.S. Mint advertisement.

In terms of campaign themes, Non-U.S. Mint customers are more likely to recognize the "Collect America" theme, while U.S. Mint customers more often believe "sharing from generation to generation" is the primary essence of the communications. Importantly, this latest round of advertising appears to have inspired two-fifths of U.S. Mint customers to make purchases with mail, phone, and web orders being about equal overall.

In addition, familiarity with the U.S. Mint increased from 85% to 91% among its customers since the Benchmark Survey. The U.S. Mint continues to be overwhelmingly recognized as a producer of U.S. coins for circulation, while the association with the Franklin Mint has decreased somewhat for U.S. Mint customers since last year. Confusion about the Franklin Mint's production of U.S. coins for circulation among U.S. Mint customers who have spent less than \$100 has been reduced by 7% since its high of 20% a year ago.

Accurate recognition of specific U.S. Mint products and inaccurate beliefs about the U.S. Mint's production of other products has remained relatively unchanged over the past year. Correct identification of U.S. Mint products has increased most among low spenders, while misidentification of antique coins as U.S. Mint products has steadily increased among high spenders. The mistaken belief that the Franklin Mint offers official U.S. Mint 50 state quarters, coin sets, and commemorative coins has not changed appreciably between surveys. As in the Benchmark Survey, accurate knowledge about the Franklin Mint's coin offerings increases as U.S. Mint spending levels rise – higher spenders are less likely to believe official coins come from the Franklin Mint. In summary, U.S. Mint customers, especially with low and moderate spend, are more accurate in identifying the Franklin Mint's products, while accuracy regarding the U.S. Mint's products has remained relatively stable.

Delving more deeply into some of the characteristics of coins, it appears that the same high percentage of U.S. Mint and Non-U.S. Mint customers know that silver proof set coins do *not* contain the same amount of silver as coins in circulation as in the Benchmark Survey. Awareness that the quality of the markings on U.S. Mint proof sets is *not* the same as coins in circulation is the same overall; however it has declined among moderate and high spending U.S. Mint customers. Knowledge that commemorative coins produced by the U.S. Mint are legal currency has remained high among both U.S. Mint customers and Non-U.S. Mint customers at 74%. Awareness that commemorative coins produced by the Franklin Mint are *not* legal currency has grown substantially among U.S. Mint customers, particularly low to moderate spenders. Thus, overall knowledge of the U.S. Mint is increasing among U.S. Mint customers, especially those with low to moderate spending levels, while knowledge among Non-U.S. Mint customers has remained relatively the same.

V. Attitudes toward the U.S. Mint & Competitors' Products

As in previous surveys, more U.S. Mint customers and Non-U.S. Mint customers consider U.S. Mint products to be authentic/genuine compared to the Franklin Mint. Belief in the authenticity of coins offered by Internet sites has grown substantially in the past year, approaching the level of authenticity offered by organizations selling via television. The perceived educational value of the U.S. Mint's coin products has increased tremendously among U.S. Mint customers over the past two years. The American Historic Society has lost some of its perceived educational value while the Franklin Mint continues to gain in value, although it remains well below that of the U.S. Mint. U.S. Mint products are increasingly seen as a sound investment among U.S. Mint and Non-U.S. Mint customers; although Non-U.S. Mint customers also see an increased investment potential in the Franklin Mint's products. Many Non-U.S. Mint coin sources are gaining in perceived investment potential, although all remain well below the U.S. Mint in their perceived investment value.

VI. Attitudes towards Coins & Coin Collecting

Coins are gaining popularity among U.S. Mint customers as great gifts -- 85% and 72% believing they make good gifts in general and for the holidays compared to 77% and 64% in the Benchmark Survey. Among U.S. Mint customers, attitudes towards coins as gifts, particularly U.S. Mint coins, have become more favorable across all spending levels during the past year. The U.S. Mint continues to be highly favored as an organization for buying coins for oneself, while favor for the Franklin Mint has declined among low spending U.S. Mint customers. Preference for the U.S. Mint as a source for coin gifts for children is as high as it is for coins for oneself; the U.S. Mint is still thought of before all other organizations even among Non-U.S. Mint customers. Similar to coin gifts for children, the U.S. Mint still receives the highest percentage of "first mentions" as a source for coin gifts for adults.

The vast majority of U.S. Mint and Non-U.S. Mint coin collectors still perceive that the best coins worth collecting are official U.S. Coins -- no changes between survey waves are evident. Among existing U.S. Mint customers, \$500+ buyers are more likely this year than last year to have adopted the view that collecting coins is a good financial investment. Attitudes regarding the familial benefits of coin collecting are becoming slightly more favorable among U.S. Mint customers and slightly less favorable among Non-U.S. Mint coin collectors.

VII. Coin & Coin-Related Behaviors

As in the prior survey, more than half of U.S. Mint customers and over one-third of Non-Mint U.S. coin collectors have purchased coins from regional or local coin dealers. U.S. Mint customers (especially moderate and high spenders) have shown a sizable increase in purchasing from the Franklin Mint over the past two years. The impetus to make a purchase from the U.S. Mint has remained steady between waves overall; \$500+ customers are now more likely to be responding to external influences. The percentage of Non-U.S. Mint coin collectors who expect to purchase coins next year has decreased; low spend buyers now show more interest in buying proof and uncirculated coins. Compared with the Benchmark Survey, more U.S. Mint customers at all spending levels expect to increase their spending with the U.S. Mint over the next year.

U.S. Mint website visitation has increased among U.S. Mint customers of all spending levels over the past year, with nearly two-thirds of customers indicating they visited the main website. Non-U.S. Mint customers have increased their use of the U.S. Mint website for obtaining information on coin collecting, although the greatest use of the website among both groups continues to be product-related information. Use of the Franklin Mint website has decreased among Non-U.S. Mint customers, although the percentage of those who purchase products when visiting the site has increased. The Internet has become the method of choice for all U.S. Mint customer segments -- more than 40% placed their most recent order this way.

VIII. Q50 Awareness, Attitudes & Behaviors

Q50 program familiarity continued to increase among U.S. Mint customers, particularly those with moderate to high spending, while familiarity among Non-U.S. Mint customers remained stable. In addition, U.S. Mint customers' recognition of the U.S. Mint's sponsorship of the Q50 program has shown a steady increase over the past two years among its customers. Non-U.S. Mint customers, on the other hand, have not shown an increase in awareness that the Q50 program is sponsored by the U.S. Mint. Over the past year, U.S. Mint customers spending \$500+ have shown the greatest increase in familiarity with the Q50 program, while those spending < \$100 have shown the greatest increase in association of the program with the U.S. Mint.

Awareness that quarters will be produced in the order in which states joined the union has remained high at nearly 80% for the total population. Knowledge that the U.S. Mint will produce five new quarters a year has also not dipped since last year. Overall awareness that production of each new quarter is limited has remained stable, although among higher spending U.S. Mint customers awareness has increased somewhat. Awareness that each quarter will be minted for only ten weeks continues to be the least familiar aspect of the Q50 program, showing no increase in awareness over the past year. Knowledge that Q50 quarters do not have a higher silver content is slowly increasing, although it has not yet approached its September 2001 peak awareness levels. Knowledge that the U.S. Mint will not produce a new quarter every month has rebounded somewhat over the past year due to increased knowledge among Non-U.S. Mint customers. Considering all aspects of the Q50 program, knowledge levels have remained stable among both U.S. Mint and Non-U.S. Mint customers since the Benchmark Survey.

The number of adults who made an effort to save, put aside or collect state quarters has also remained steady at 135M. Proportionately more U.S. Mint customers are actively engaged in both saving and purchasing state quarters this year compared with prior years. Compared to the Benchmark Survey, slightly more U.S. Mint customers plan to collect more than one quarter from each state in the future.

IX. Conclusions & Recommendations

These results demonstrate that U.S. Mint advertising plays an important role in reducing brand confusion and dilution, and, at the same time, serving as a stimulus for making purchases. Advertising recall is up. Such advertising appears to have prompted a sizable percentage of customers to make purchases. Familiarity and knowledge about the U.S. Mint in comparison to the Franklin Mint has improved. Future interest in buying coins, especially among lower spend customers, is also increasing.

Furthermore, there appears to be more recognition that U.S. Mint products make good gifts and greater use of the U.S. Mint website than in the past. Therefore, in the context of all these things taken together, it would be wise for the U.S. Mint to continue its "Genuine U.S. Mint" advertising campaign as it appears to create both greater interest in and purchase of U.S. Mint coins. While it is still too early to tell if the campaign will have lasting effects, the early indications are that it is having a noticeable impact on U.S. Mint brand recognition and value. Lastly, it may be beneficial to determine what additional themes and/or messages would be most appealing as plans for the 2004 campaign are being developed to ensure continued affinity results among newer and lower spend customers to whom the efforts are primarily directed.

Background...

IN THE FACE OF REVENUE DECLINES IN 2001 AND 2002, THE U.S. MINT LAUNCHED AN AGGRESSIVE ADVERTISING CAMPAIGN DESIGNED TO BOLSTER ITS RECOGNITION AS A HIGH QUALITY PROVIDER OF U.S. COINS

- The "Genuine United States Mint" advertising program features core products to let the public know that the U.S. Mint **brand** stands for the highest quality products that can be shared by generations of Americans; the campaign focuses on...
 - Gift giving
 - Coin collecting as a family tradition
 - American history
 - United States Mint products as cultural icons
- Broadcast and print advertising were used to communicate these themes from November through December of 2002, and again from April through August of 2003
 - Network and cable television
 - National papers and magazines (e.g., USA Today, Newsweek, TV Guide, etc.)

Background...

ASIDE FROM INCREASING ITS RECOGNITION, THE U.S. MINT INITIATED ITS "GENUINE" PROGRAM TO REVITALIZE COIN COLLECTING AND PLANT THE SEEDS FOR MORE SUSTAINED SALES GROWTH

- Because prior research has shown that the U.S. Mint is often confused with some of its noteworthy competitors (e.g., Franklin Mint, etc.), a desire to build a **stronger brand identity** became paramount; specifically to...
 - Increase accurate recognition
 - Strengthen associations with particular core products (e.g., proof sets, etc.)
 - Differentiate itself from private Mints and other coin sources
- In addition, prior research has indicated that individuals who are encouraged to collect coins at an early age are apt to continue into adulthood and, thereafter, to pass on this interest to their children or grandchildren
 - Parents, grandparents, and even teachers can be instrumental in creating a love of coins
 - When the virtues of coin collecting are extolled, interest in U.S. Mint coins is apt to grow
- Thus, the "Genuine United States Mint" advertising campaign has, as one of its goals, to **educate the American public about coins and coin collecting** to...
 - Acquire new, more committed customers
 - Retain and increase sales from existing customers

Objectives...

IN THIS CONTEXT, THE U.S. MINT COMMISSIONED NATIONAL ANALYSTS TO MEASURE THE CAMPAIGN'S EFFECTIVENESS; NAMELY, TO DETERMINE IF ITS BRAND IDENTITY IS BEING STRENGTHENED AND INTEREST IN COIN COLLECTING IS RISING AS INTENDED

- At this juncture, two research phases have been commissioned; although more are envisioned
 - Phase I: *Benchmark* to establish existing awareness, attitudes, and behaviors
 - Phase II: *First Follow-Up* to determine the campaign's impact, if any, on the brand
- The *Benchmark Survey* was conducted at the time of the launch (i.e., three weeks immediately surrounding the first print ads)
- The *First Follow-Up Survey*, to which this report is addressed, was conducted approximately six months after the initial holiday advertising and coincident with the end of the summer media blitz
- Both surveys measure U.S. Mint customers' and non-customers'...
 - Recognition of the Mint and key competitors
 - Attitudes towards the U.S. Mint
 - Attitudes towards coin collecting
 - Coin and coin-related behaviors
 - Q50 awareness, attitudes, and behaviors

Methodology... Sample Design & Selection

THREE SAMPLING FRAMES -- THOSE PREVIOUSLY INTERVIEWED, U.S. MINT CUSTOMERS, AND RDD LIST -- WERE USED TO IDENTIFY CUSTOMERS AND NON-CUSTOMERS FOR THIS FIRST FOLLOW-UP

- All respondents who participated in the Benchmark Survey and agreed to be recontacted were invited to participate in the first follow-up survey
- The Benchmark Survey sample was supplemented with additional U.S. Mint customers (not previously interviewed) to ensure a diverse group of customers with different purchase patterns were included

Stratified into six buyer segments based upon each customer's total annual expenditures and number of buying occasions in the past year

- Furthermore, a new random-digit-dial (RDD) telephone sample was selected for this wave from telephone exchanges and working banks of four-digit numbers that included both listed and unlisted telephone numbers throughout the U.S.; served to...
 - Identify Non-U.S. Mint coin collectors and non-collectors (i.e., Non-U.S. Mint customers)
 - Supplement such individuals interviewed previously
- Together, all samples were designed to yield approximately 1,500 completed interviews reflecting both longitudinal and cross-sectional components

Methodology... Data Collection

IN THE FOUR-WEEK PERIOD FOLLOWING THE END OF THE SUMMER 2003 ADS, MORE THAN 1,500 COMPUTER-ASSISTED TELEPHONE INTERVIEWS WERE COMPLETED

- Overall, 1,503 interviews (see next page) were completed during the designated data collection period, lasting an average of 25-27 minutes each
- New interviews were conducted with either the sampled U.S. Mint customer (from U.S. Mint sample) or an adult 18 years of age or older if part of the RDD sample
 - Each individual was screened to ascertain relevant collecting and coin purchasing behaviors
 - Those from the RDD who had made purchases from the U.S. Mint were treated as customers
 - U.S. Mint sampled customers claiming not to have made a purchase were terminated
- Follow-up interviews were conducted with the same individuals as previously*

U.S. Mint customers retained their sample designation if they made a purchase within the 12 month time frame

If no purchase was made, U.S. Mint customers became Non-U.S. Mint customers

(Continued)

* Includes both those who originally came from U.S. Mint files and the Benchmark Survey RDD sample

Methodology... Data Collection

- The distribution of completed interviews by the various sampling strata are shown below

Table 1
Distribution of Completed Interviews by Sampling Cell

Respondent Type	Benchmark Survey Sample		First Follow-Up Survey New Sample		Total	
	U.S. Mint Customers	Non-U.S. Mint Customers	U.S. Mint Customers	Non-U.S. Mint Customers	U.S. Mint Customers	Non-U.S. Mint Customers
Classification Following First Follow-Up Data Collection						
<i>U.S. Mint Customers</i>	225	22	431	25	656	47
Less than \$100 past year spend	50	17	175	12	225	29
\$100 to \$499 past year spend	116	5	198	10	314	15
\$500 or more past year spend	59	0	58	3	117	3
<i>Non-U.S. Mint Customers</i>	16	214	--	570	16	784
U.S. Coin Collectors	11	129	--	228	11	357
Non-Coin Collectors	5	85	--	342	5	427
TOTAL	241	236	431	595	672	831

Methodology... Data Collection

THE QUESTIONNAIRE, DEVELOPED IN CONJUNCTION WITH THE U.S. MINT RESEARCH TEAM, WAS IDENTICAL TO THE BENCHMARK SURVEY, WITH A FEW ADVERTISING RECALL QUESTIONS ADDED

- The questionnaire contained a total of six areas of inquiry...
 - Attitudes towards coin collecting
 - Recognition of the Mint and competitors and their products
 - Advertising recall
 - Attitudes towards buying U.S. Mint and competitors' products
 - In-depth Q50 current and future coin collecting habits
 - Demographics and media habits
- With respect to the advertising recall section of the survey, several new questions were added in the First Follow-up Wave to gauge the advertising effect...

Recall of specific television channel or magazine responsible for advertising
Recall of advertising theme(s)

Purchasing behavior as a result of seeing/hearing U.S. Mint advertising

(Continued)

Methodology... Data Collection

- Seven key competitors of the U.S. Mint were included in the survey
 - The Franklin Mint (perceived as the primary competitor)
 - The American Historic Society
 - Uncover
 - TV shopping programs (e.g., the Home Shopping Network, QVC, etc.)
 - Internet auction sites (e.g., eBay)
 - Regional or local coin dealers
 - Companies offering coins through direct mail, newspapers, or magazine ads
- To ensure that evaluations of both the U.S. Mint and other private Mints were obtained without creating undue burden on survey respondents (i.e., exceeding approximately 25 minutes in interview length), a randomization technique was employed
 - Each respondent was asked to rate the U.S. Mint, the Franklin Mint and one of the other private Mints or coin purchasing providers (see list above)
- A copy of the full questionnaire used in the First Follow-Up can be found in the Appendix

Methodology... Data Preparation & Weighting

PRIOR TO COMPLETING THE ANALYSIS, THE DATA WERE CLEANED AND WEIGHTED TO REFLECT U.S. MINT CUSTOMER TOTALS, AS WELL AS THE UNIVERSE OF NON-U.S. MINT CUSTOMERS IN THE U.S.

- All completed interviews were reviewed for logic and consistency and classified into their correct U.S. Mint customer and non-U.S. Mint customer stratum, based upon the survey responses
- Customer population totals obtained from the U.S. Mint and adult population totals from the U.S. Census provided preliminary weighting targets for U.S. Mint customers and non-customers
- Weights were constructed so that the sample represented the estimated size of the customer population within the U.S. Mint expenditure and first-time/repeat buyer strata and the remaining adult U.S. population at the time of the first follow-up study

New respondents (i.e., respondents in the 2003 sample who did not come from the Benchmark Survey) were given initial base weights reflecting their respective sampling strata
Re-interviewed respondents received initial base weights reflecting their original sampling strata
All respondents were then post-stratified into spending post-strata using current customer and non-customer counts and their self-reported past year spending amounts

(Continued)

Methodology... Data Preparation & Weighting

Table 2 below shows the distribution of interviews and weighted estimated population totals following post-stratification

Table 2
Distribution of Survey Respondents & Estimated Population Totals by Sampling Strata

Respondent Type	# of Respondents	Estimated Total Population
<i>U.S. Mint Customers</i>	703	1,205,000
<i>Less than \$100 past year spend</i>	254	802,000
First-time buyers	23	78,000
Repeat buyers	231	724,000
<i>\$100-\$499 past year spend</i>	329	335,000
First-time buyers	23	23,000
Repeat buyers	306	313,000
<i>\$500 or more past year spend</i>	120	67,000
First-time buyers	6	2,000
Repeat buyers	114	66,000
<i>Non-U.S. Mint Customers</i>	800	210,432,000
Total	1,503	211,637,000

Methodology... Analysis & Reporting

THE FOLLOW-UP SURVEY ANALYSIS FOCUSES ON AWARENESS, ATTITUDES, AND BEHAVIORS RELATED TO COINS, COIN COLLECTING, AND THE U.S. MINT AND ITS COMPETITORS, INCLUDING ITS Q50 PROGRAM

- First, U.S. Mint customers and Non-U.S. Mint customers are compared in terms of their demographics and media habits; results provide...
 - Clues for future advertising placement decisions
 - Insights into any demographic shifts to U.S. Mint customers
- Second, U.S. Mint customers and Non-U.S. Mint customers are compared on each of the key advertising effectiveness outcomes – both at this follow-up and to the benchmark survey
 - Recognition of the U.S. Mint and competitors (overall, advertising, product recall)
 - Attitudes towards and perceptions of the U.S. Mint and its products
 - Attitudes towards coin collecting
 - Coin and coin-related behaviors
 - Q50 awareness, attitudes and behaviors
- In addition, where appropriate, the First Follow-up Survey (designated as “Wave 2”) is compared to previous research efforts; comparisons are made to...
 - The Benchmark survey for this project – 11/02
 - One National Analysts’ survey (Brand Tracking) – 9/01
 - Three Peter D. Hart surveys – 3/00, 10/00, and 12/00

(Continued)

Methodology... Analysis & Reporting

- The following guidelines should be kept in mind as the report is reviewed
 - The terms "general public" and "American public" refer to the entire U.S. adult population – both U.S. Mint and Non-U.S. Mint customers
 - Some tables include a "total sample" column that represents both U.S. Mint customers and non-customers; it should be noted that the latter group dominates the total and is presented simply for comprehensiveness
 - The current Follow-up Survey is designated as "9/03" and should not be confused with the Benchmark Survey designated as "11/02" or with the Brand Tracking Survey designated as "9/01"
 - Some differences between the Benchmark and Brand Tracking surveys may be attributable to differences in data collection methodology – the former was entirely telephone, while the latter included both telephone and mail data collection
 - Differences of 5% or more are highlighted as being meaningful, although a difference of this size is not necessarily statistically significant given the sample sizes in this study

U.S. Mint Customer & Non-Customer Profile... Demographics

THE DEMOGRAPHICS OF U.S. MINT CUSTOMERS COMPARED TO THOSE IN THE BENCHMARK SURVEY AND NON-U.S. MINT CUSTOMERS REMAINS RELATIVELY UNCHANGED

- Tables 3a and 3b show that U.S. Mint customers, compared to Non-U.S. Mint customers, are...
 - Over 60% men (vs. 30%)
 - Much older (57% vs. 29% aged 55 or older)
 - Grandparents (53% vs. 32%)
 - More affluent (50% vs. 34% \$50,000 or higher annual income)
 - More retired (46% vs. 17%)
- Similarly, among U.S. Mint customers, compared to those whose purchases are of lower value, those whose annual purchases are \$500 or more are...
 - Predominantly men (85%)
 - Substantially older (68% aged 55 or older)
 - More affluent (62% with incomes of \$50,000 or more)
 - More likely to be retired (59%)
- Compared to the Benchmark Survey, current survey respondents are a bit older and somewhat more retired*

* For comparison purposes, complete demographics tables from the November, 2002 Recognition Benchmark Survey can be found in the Appendix

U.S. Mint Customer & Non-Customer Profile... Demographics

Table 3a
Demographics by Customer Status

Demographics of Customers (Base)						
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100 - \$499 (%)	\$500+ (%)	
Gender						
Male	30	63	58	72	85	30
Female	70	37	42	28	15	70
Age*						
18-34	30	9	11	5	3	30
35-54	40	34	33	35	29	40
55 or over	29	57	55	60	68	29
Presence of Children**						
Have children under 18 years	38	24	25	21	14	38
Have children newborn to three years of age	36	34	37	27	24	36
Have children preschool or kindergarten age	29	16	16	15	24	29
Have children in grade school	51	42	39	48	44	51
Have children in high school	32	40	38	44	49	32
Presence of Grandchildren**						
Have grandchildren	32	53	52	54	58	32
Have grandchildren newborn to three years of age	56	43	40	50	52	56
Have grandchildren preschool or kindergarten age	45	42	42	42	45	45
Have grandchildren in grade school	55	60	59	63	61	55
Have grandchildren in high school	35	39	39	42	32	35
(Approximate Base)						
	(1,503)	(703)	(254)	(329)	(120)	(800)

* May not sum to 100% due to rounding.

** Does not sum to 100% due to multiple responses.

Source: Q35, Q.37, Q.38, Q.39, Q.40, Q.45

U.S. Mint Customer & Non-Customer Profile... Demographics

Table 3b
Demographics by Customer Status

		Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
				<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Education*							
High School or less	29	20	19	21	20	29	
Some College	38	38	39	38	32	36	
College Graduate	20	23	23	22	26	20	
Post Graduate Degree	15	19	18	19	22	15	
Total Household Income*							
Less than \$20,000	24	9	10	6	3	24	
\$20,000 to \$49,999	42	42	42	41	35	42	
\$50,000 to \$74,999	16	22	22	23	22	16	
\$75,000 or more	18	28	26	29	40	18	
Employment Status*							
Full-time	48	38	37	44	33	48	
Part-time	16	9	10	6	4	16	
Retired	18	46	46	42	59	17	
Not Employed or Student	18	7	8	8	4	18	
(Approximate Base)		(1,503)	(703)	(254)	(329)	(120)	(800)

* May not sum to 100% due to rounding.
Source: Q.36, Q.41, Q.42

U.S. Mint Customer & Non-Customer Profile... Media Habits

NEWS, EDUCATIONAL, SCIENCE OR NATURE, HOME & GARDEN, AND SPORTS MAGAZINES ARE FAVORED BY BOTH U.S. MINT AND NON-U.S. MINT CUSTOMERS AS WAS THE CASE IN THE BENCHMARK SURVEY

- Business/Personal Finance and Hobby/Collecting magazines are a particular favorite of U.S. Mint Customers spending < \$100, showing about a 5% increase from last year

Table 4
Magazine Readership by Customer Status*

% Reading Magazines a Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
News	25	34	33	36	34	25
Educational, Science or Nature	18	20	19	20	22	18
Home & Garden	15	12	14	7	5	15
Sports	12	18	18	16	20	12
Entertainment	11	7	8	5	4	11
Family or Parenting	9	6	7	4	2	9
Fashion	9	3	4	2	0	9
Hobbies or Collecting	9	16	16	16	22	9
Business or Personal Finance	7	17	15	20	21	7
Automotive	6	6	6	5	6	6
Popular Culture	5	3	3	2	4	5
% Reading Magazines a Little/Not Regularly	33	29	30	27	26	33
(Approximate Base)	(1,503)	(703)	(254)	(329)	(120)	(800)

* Does not sum to 100% due to multiple responses.
Source: Q.27

U.S. Mint Customer & Non-Customer Profile... Media Habits

THERE HAVE BEEN NO CHANGES IN THE NEWSPAPER READING HABITS OF EITHER U.S. MINT CUSTOMERS AND NON-U.S. MINT CUSTOMERS – NEARLY EVERYONE CLAIMS TO READ ONE PAPER REGULARLY

Table 5
Newspaper Readership by Customer Status*

% Reading Newspapers on a Regular Basis	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers				Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)		
Town, county or other local weekly	67	69	68	73	58		67
State, regional, metropolitan weekend	59	68	67	68	78		59
State, regional, metropolitan daily	52	65	65	67	66		52
National	26	29	27	34	36		26
Business	14	20	19	24	26		14
% Not Reading Newspapers Regularly	14	9	9	8	10		14
(Approximate Base)	(1,503)	(703)	(254)	(329)	(120)		(800)

* Does not sum to 100% due to multiple responses.
Source: Q.28

U.S. Mint Customer & Non-Customer Profile... Media Habits

NEWS PROGRAMS REMAIN THE TYPE OF PROGRAM MOST WATCHED BY U.S. MINT CUSTOMERS AND NON-U.S. MINT CUSTOMERS; EDUCATIONAL AND SPORTS PROGRAMS ARE MORE PREVALENT AMONG U.S. MINT CUSTOMERS WHILE MOVIES (NOT SPORTS) ARE THE CHOICE OF NON-CUSTOMERS

- Relatively few changes between waves among customers with different spending levels are noted
 - educational programs are now more popular among low and moderate spenders

Table 6

Network Television Viewership by Customer Status [*]						
% Watch Network Television Programs a Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
News	64	72	71	72	78	64
Movies	48	38	38	39	32	48
Educational/Documentaries	46	56	56	55	60	46
Dramatic Series	28	26	27	25	19	28
Sports	27	40	40	41	35	27
Sitcoms	24	20	22	16	12	24
Talk Shows	15	10	8	13	13	15
Game Shows	13	11	11	9	11	13
% Watch Network Television a Little/Not at all	8	7	8	6	2	8
(Approximate Base)	(1,503)	(703)	(254)	(329)	(120)	(800)

^{*} Does not sum to 100% due to multiple responses.
Source: Q.22

U.S. Mint Customer & Non-Customer Profile... Media Habits

ACCESS TO AND VIEWING OF CABLE TV HAS REMAINED HIGH IN THIS FIRST FOLLOW-UP SURVEY; IN FACT, SOME GROWTH IN ACCESS IS EVIDENT AMONG HIGHER SPENDING U.S. MINT CUSTOMERS

- More moderate and high spending customers have cable access in 2003 compared with 2002 – 86% and 91% versus 80% and 82% respectively

Table 7a
Cable Access & Frequency of Viewing by Customer Status

	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Cable Access						
% with access	77	81	78	86	91	77
(Base)	(1,503)	(703)	(254)	(329)	(120)	(800)
Channels Watched*						
% watch at least one a lot	84	85	86	83	81	84
% watch moderately	15	15	13	17	19	15
% watch none at all	1	<1	1	0	0	1
(Base)	(1,203)	(589)	(200)	(280)	(109)	(614)

* Channels include Discovery, TNT, TBS, History Channel, Learning Channel, Lifetime, Fox Family, A&E, Home & Garden, and the Food Network.
Source: Q.23, Q.24

U.S. Mint Customer & Non-Customer Profile... Media Habits

THE DISCOVERY AND HISTORY CHANNELS REMAIN THE FAVORITES OF U.S. MINT CUSTOMERS, LIFETIME IS CLEARLY A MORE PREFERRED CHOICE AMONG NON-U.S. MINT CUSTOMERS

- Viewership of the Fox Family Channel is down among U.S. Mint Customers (now at 17% vs. 23% in the Benchmark Survey)

Table 7b
Cable Television Viewership by Customer Status*
(Among those with Cable TV Access)

% Watching Cable Television Channels A Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Discovery	47	55	55	55	57	47
TNT, TBS or other general entertainment	36	35	35	34	30	36
The History Channel	33	49	49	52	42	33
Lifetime	30	16	17	14	15	30
The Learning Channel	29	29	28	29	37	29
A & E	26	32	30	38	26	26
Fox Family Channel	22	17	16	16	28	22
Home and Garden	18	19	21	16	16	18
The Food Network	14	16	18	14	12	14
(Approximate Base)	(1,202)	(589)	(200)	(280)	(109)	(613)

* Does not sum to 100% due to multiple responses.
Source: Q 24

U.S. Mint Customer & Non-Customer Profile... Media Habits

RADIO LISTENING HAS INCREASED SLIGHTLY FROM THE BENCHMARK SURVEY AMONG U.S. MINT CUSTOMERS AND NOT CHANGED FOR NON-U.S. MINT CUSTOMERS

- In fact, listening at all times of the day has increased for high spending U.S. Mint Customers – from a 5% to 7% increase in each day part

Table 8
Times of Day & Week Radio Listened To by Customer Status

	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers				Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)		
Time of Week Listen to the Radio*							
Weekdays	25	28	31	24	18		25
Weekends	5	3	3	4	1		5
Both	53	47	46	49	49		53
Neither	16	22	20	24	32		16
(Approximate Base)	(1,503)	(703)	(254)	(325)	(120)		(800)
Time of Day Listen to the Radio**							
Early morning	75	75	74	75	85		75
Late morning or afternoon	67	60	58	66	72		67
Early evening	52	43	41	48	50		53
Late evening	35	24	24	24	29		35
(Approximate Base)	(1,209)	(542)	(202)	(252)	(88)		(667)

* May not sum to 100% due to rounding.

** Does not sum to 100% due to multiple responses.
Source: Q.30

U.S. Mint Customer & Non-Customer Profile... Media Habits

ACCESS TO THE INTERNET AND THE FREQUENCY OF USING AT LEAST ONE KEY WEBSITE A LOT REMAINS HIGHER AMONG U.S. MINT CUSTOMERS THAN NON-U.S. MINT CUSTOMERS

- Access to the Internet continues to grow among U.S. Mint customers as more of them at all spending levels have Internet access now compared to a year ago – up 8% overall

Table 9a
Internet Access & Frequency of Key Site Usage by Customer Status

Internet Access & Frequency of Key One-Click Customer Services							
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)		
Internet Access							
% with access	72	77	78	76	76	72	
(Base)	(1,503)	(703)	(254)	(329)	(120)	(800)	
Key Site Internet Usage*							
% use at least one a lot	55	66	65	69	73	55	
% use moderately	38	31	33	27	26	38	
% use none at all	7	2	2	4	1	7	
(Base)	(1,128)	(553)	(199)	(253)	(101)	(575)	

* Sites include Yahoo, new sites like CNN, eBay, Amazon.com, and retail store, financial and government sites.

Source: Q.29, Q.30

U.S. Mint Customer & Non-Customer Profile... Media Habits

COMPARED TO NON-U.S. MINT CUSTOMERS, U.S. MINT CUSTOMERS WITH INTERNET ACCESS ARE MORE LIKELY TO VISIT NEWS AND FINANCIAL WEB SITES AS OBSERVED IN THE BENCHMARK SURVEY

- U.S. Mint customers spending \$500+ continue to be particularly interested in government websites
- This group of customers reports a slight decline in visiting Yahoo, eBay, financial sites, and Amazon compared with last year – at least 6% for each of these sites

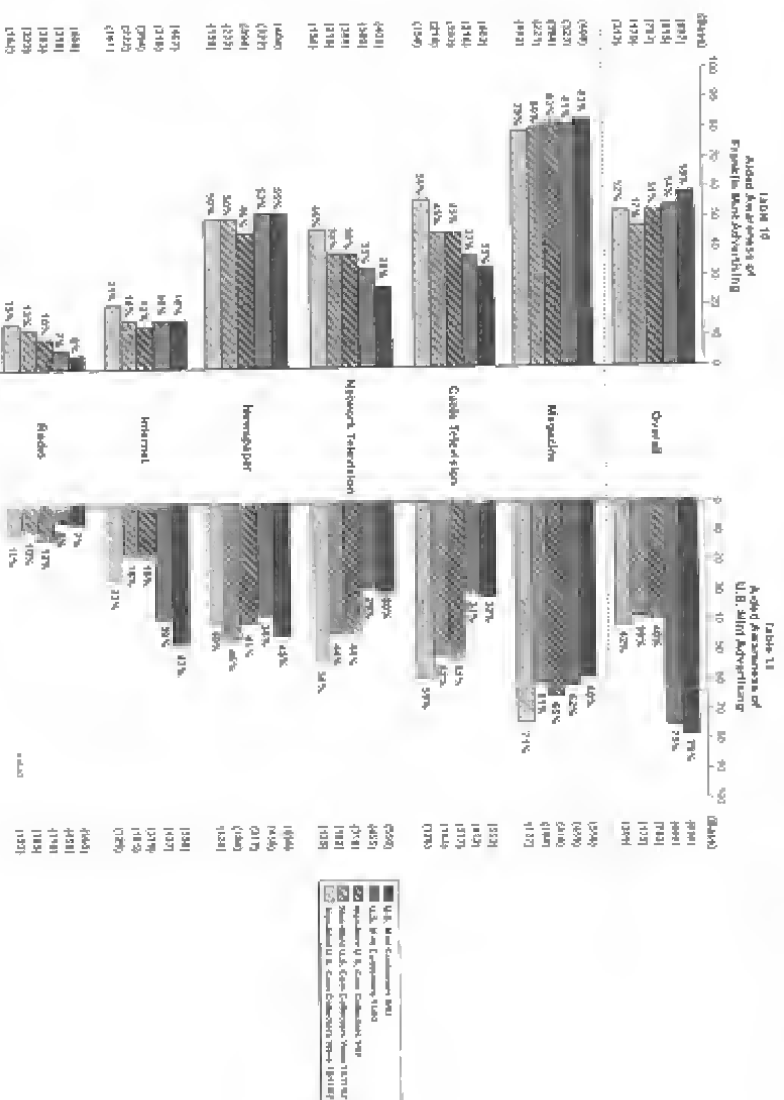
Table 9b
Key Site Internet Usage by Customer Status*
(Among those with Internet Access)

% Visiting Internet Sites A Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Yahoo	33	29	30	28	17	33
News sites like CNN	17	23	24	20	18	17
eBay	14	19	20	18	23	13
Websites of retail stores	12	10	10	9	9	12
Government websites	10	14	11	17	27	10
Financial sites	8	20	19	23	25	8
Amazon.com	8	7	7	6	4	8
(Approximate Base)	(1,128)	(553)	(199)	(253)	(101)	(575)

* Does not sum to 100% due to multiple responses.
Source: Q.30

Recognition of the U.S. Mint & Competitors... Advertising Recall

OVER THE PAST YEAR, THERE HAS BEEN AN INCREASE IN THE PERCENTAGE OF U.S. MINT CUSTOMERS WHO BELIEVE THEY HAVE SEEN U.S. MINT ADVERTISING ON THE INTERNET AND IN NEWSPAPERS



* Wave 1A: Interviews prior to 11/29/02.

** Wave 1B: Interviews from 11/29 - 12/8/02.

Source: Q.21a1, Q.21a2, Q.21b1, Q.21b2

Recognition of the U.S. Mint & Competitors... Advertising Recall

DISCOVERY, ABC, AND NBC ARE THE MOST COMMON TV CHANNELS IDENTIFIED AS CARRYING U.S. MINT ADVERTISEMENTS, ALTHOUGH ONE-HALF OF "TV RECALL" CUSTOMERS DO NOT REMEMBER WHICH CHANNEL HAD SUCH ADS

Table 11b
Television Channels Carrying U.S. Mint Ads by Customer Status
(Among those who remembered having seen U.S. Mint advertising on television in past 6 months)

	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Discovery	9	11	9	13	16	9
ABC	7	10	10	10	7	7
NBC	7	13	16	7	5	7
CBS	6	8	9	8	3	6
History	5	7	6	8	5	5
Shopping Channel	5	6	7	6	8	5
TLC	4	1	0	1	6	4
Fox	4	1	1	1	3	4
A&E	4	4	4	4	5	4
Lifetime	2	0	0	0	0	2
CNN	2	4	5	2	0	2
Fox News	1	<1	0	1	0	1
AMC	0	0	0	0	0	0
Univision	0	0	0	0	0	0
BET	0	0	0	0	0	0
Other (specify)	16	7	8	4	8	16
Don't Know	47	50	44	62	54	47
(Base)	(457)	(253)	(82)	(117)	(54)	(204)

Recognition of the U.S. Mint & Competitors... Advertising Recall

OVER FOUR-FIFTHS OF U.S. MINT CUSTOMERS AND NEARLY THREE-FOURTHS OF NON-U.S. MINT CUSTOMERS DO NOT REMEMBER THE NAME OF THE MAGAZINE IN WHICH THEY SAW A U.S. MINT ADVERTISEMENT

- Time and Better Homes & Gardens ring a bell for Non-U.S. Mint customers
- Newsweek is particularly remembered by moderate spending U.S. Mint customers

Table 11b
Magazines Displaying U.S. Mint Ads by Customer Status
(Among those who remembered having read U.S. Mint advertising in a magazine in past 6 months)

	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Time	9	5	4	6	1	9
Better Homes & Garden	8	2	3	0	0	8
Newsweek	5	6	6	10	2	5
Reader's Digest	4	4	4	4	2	4
Family Circle	3	1	2	0	0	3
Ladies' Home Journal	2	<1	0	1	1	2
Women's Day	2	2	3	1	0	2
Military Times	0	<1	0	1	0	0
Baby Talk	0	0	0	0	0	0
Parents	0	0	0	0	0	0
Don't Know	72	81	80	80	95	72
(Base)	(530)	(324)	(117)	(137)	(70)	(206)

Recognition of the U.S. Mint & Competitors... Advertising Recall
**NON-U.S. MINT CUSTOMERS ARE MORE LIKELY TO RECOGNIZE THE
 "COLLECT AMERICA" THEME, WHILE U.S. MINT CUSTOMERS MORE OFTEN
 BELIEVE "SHARING FROM GENERATION TO GENERATION" AS THE THEME**

- U.S. Mint customers are more likely to report multiple themes compared to Non-U.S. Mint customers
- For the most part, recall of specific themes increases with U.S. Mint spending levels

Table 11c
U.S. Mint Advertising Theme Recognition by Customer Status*
 (Among those who remembered having seen/heard/read U.S. Mint advertising in past 6 months)

% Recognizing Theme of Advertising	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	
Collect America	56	43	41	48	46	56
Sharing coin collecting from generation to generation	50	52	50	54	62	50
Liberty for all / Liberty, freedom and American history	48	41	40	43	41	48
Coins as birthday gifts or for a baby's birth	43	45	44	49	40	43
Worth a Mint	22	21	20	24	17	22
U.S. coins being like the coins of ancient Greece	14	10	10	12	8	14
Something else (specify)	14	15	14	16	23	22
Recognized three or more themes	16	27	24	31	35	16
(Base)	(790)	(494)	(170)	(230)	(94)	(296)

* Sum to more than 100% due to multiple responses.
 Source: Q.21a5

Recognition of the U.S. Mint & Competitors... Purchasing as a Result of Advertising

THIS LATEST ROUND OF ADVERTISING INSPIRED TWO-FIFTHS OF U.S. MINT CUSTOMERS TO MAKE PURCHASES WITH MAIL, PHONE, AND WEB ORDERS BEING ABOUT EQUAL OVERALL

- The Internet was less of a choice among low spenders compared to using the mail

Table 11d
U.S. Mint Advertising Impact on Order Placement by Customer Status
(Among those who remembered having seen/heard/read U.S. Mint advertising in past 6 months)

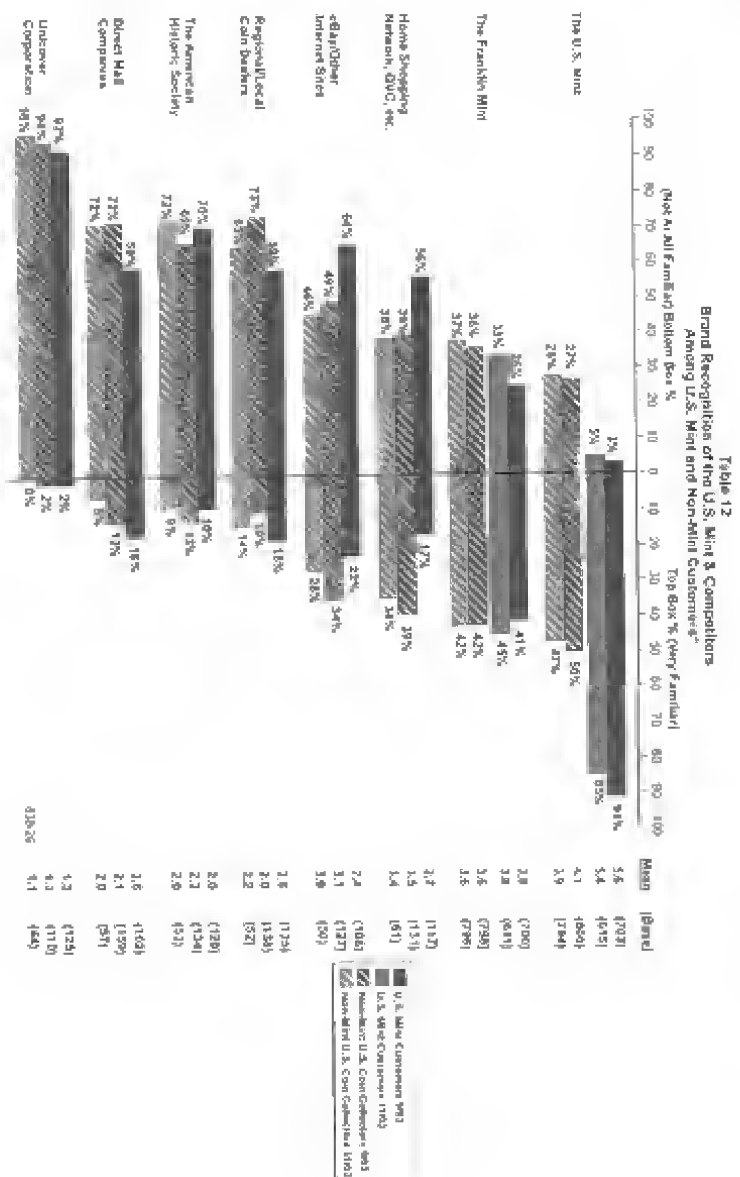
	Total U.S. Mint Customers (%)	U.S. Mint Customers		
		<\$100 (%)	\$100-\$499 (%)	\$500+ (%)
Percent made purchase	40 (Base)	39 (198)	42 (264)	44 (102)
Order method				
Mail	37	38	35	25
Phone	32	32	29	39
Fax	0	0	0	0
Internet	32 (Base)	29 (79)	36 (109)	36 (43)

Source: Q21a6, Q21a7, Q21a8

Recognition of the U.S. Mint & Competitors... Brand Recognition

FAMILIARITY WITH THE U.S. MINT INCREASED FROM 85% TO 91% AMONG ITS CUSTOMERS SINCE THE BENCHMARK SURVEY

- Recognition of Internet Sites and Direct Mail companies increased among Non-U.S. Mint Coin Collectors



* On a scale from "1" to "6" where "1" means "Not at all Familiar" and "6" means "Very Familiar."
Source: Q.1

Recognition of the U.S. Mint & Competitors... Brand Recognition

THE U.S. MINT CONTINUES TO BE OVERWHELMINGLY RECOGNIZED AS A PRODUCER OF U.S. COINS FOR CIRCULATION, WHILE THE ASSOCIATION WITH THE FRANKLIN MINT HAS DECREASED SOMEWHAT FOR U.S. MINT CUSTOMERS SINCE LAST YEAR

- Despite a drop from a year ago, Non-U.S. Mint customers continue to perceive that The Franklin Mint produces coins for circulation at a higher rate than two years ago

Table 13a
Aided Recall of Organizations Producing U.S. Coins for Circulation
Among U.S. Mint Customers & Non-Customers*

	Total Sample			Total U.S. Mint Customers			Non-Mint Customers		
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)
The United States Mint	94	94	93	98	98	99	94	94	93
The Franklin Mint	31	30	22	12	16	7	31	30	22
Direct Mail Companies							20	23	12
eBay or Other Internet Sites							9	17	6
The American Historic Society							15	16	5
Regional/Local Coin Dealers							13	12	8
Home Shopping Network, QVC, etc.							19	11	9
Unicover Corporation							7	**	10
(U.S. Mint/Franklin Mint Base)	(1,467)	(1,309)	(1,106)	(697)	(571)	(811)	(770)	(738)	(295)
(Approximate Base**)							(122)	(49)	

* Does not sum to 100% due to multiple responses.

** Sample size too small to report.

*** Base listed is an average of the six other U.S. Mint competitors' bases.

Source: Q4

Recognition of the U.S. Mint & Competitors... Brand Recognition

CONFUSION ABOUT THE FRANKLIN MINT'S PRODUCTION OF U.S. COINS FOR CIRCULATION AMONG U.S. MINT CUSTOMERS WHO HAVE SPENT LESS THAN \$100 HAS BEEN REDUCED BY 7% SINCE ITS HIGH OF 20% A YEAR AGO

- Nearly 10% of high spend U.S. Mint customers mistakenly credit the Franklin Mint with producing circulating U.S. coins, up from 4% last year – perhaps a function of inattentiveness to the name of the Mint being asked about

Table 13b
Aided Recall of Organizations Producing U.S. Coins for Circulation
Among U.S. Mint Customer Groups*

	Total U.S. Mint Customers			U.S. Mint Customers								
	9/03 (%)	11/02 (%)	9/01 (%)	<\$100			\$100-\$499			\$500+		
				9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)
The United States Mint	98	98	99	98	98	99	98	98	99	99	98	100
The Franklin Mint	12	16	7	13	20	8	10	8	6	9	4	6
(Approximate Base)	(697)	(571)	(811)	(251)	(181)	(227)	(327)	(288)	(310)	(119)	(103)	(275)

* Does not sum to 100% due to multiple responses.
Source: Q.4

Recognition of the U.S. Mint & Competitors... Product Recognition

ACCURATE RECOGNITION OF SPECIFIC U.S. MINT PRODUCTS AND INACCURATE BELIEFS ABOUT THE U.S. MINT'S PRODUCTION OF OTHER PRODUCTS HAVE REMAINED RELATIVELY UNCHANGED OVER THE PAST YEAR

- More U.S. Mint Customers are aware that the U.S. Mint does not produce official foreign coins compared with the Benchmark Survey

Table 14a
Familiarity with U.S. Mint Product Offerings Among U.S. Mint Customers & Non-Mint Customers*

	Total Sample			Total U.S. Mint Customers			Non-Mint Customers			
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	Wave 1B** 11/02 (%)	Wave 1A** 11/02 (%)	9/01 (%)	
U.S. Mint 50 State Quarters Program	80	80	77	98	95	95	80	81	77	
Other U.S. Coins	74	75	47	92	91	78	74	76	47	
Official U.S. Mint Coin Sets	71	69	77	98	94	98	71	73	77	
Official U.S. Mint Commemorative Coin Sets	65	66	66	83	85	84	65	70	66	
Antique U.S. Coins	41	42	12	30	30	8	41	45	12	
Painted or Colorized U.S. Coins	34	33	15	26	29	12	34	32	15	
Coin Jewelry/Gift Items	31	31	12	70	68	51	31	33	11	
Thematic Commemorative Coins/Medallions	30	30	5	48	46	2	29	32	5	
Official Foreign Coins	16	15	8	14	22	2	16	13	9	
(Approximate Base)	(1,503)	(1,412)	(1,190)	(703)	(613)	(859)	(800)	(319)	(480)	
									(331)	

* Does not sum to 100% due to multiple responses.
 ** Wave 1A: Interviews prior to 9/29/02 and Wave 1B: Interviews from 11/02-12/8/02.
 Source: Q.3a

Recognition of the U.S. Mint & Competitors... Product Recognition

CORRECT IDENTIFICATION OF U.S. MINT PRODUCTS HAS INCREASED MOST AMONG LOW SPENDERS, WHILE MISIDENTIFICATION OF ANTIQUE COINS AS U.S. MINT PRODUCTS HAS STEADILY INCREASED AMONG HIGH SPENDERS

- More moderate spenders mistakenly believe the U.S. Mint produces thematic commemorative coins/medallions compared with last year

Table 14b
Familiarity with U.S. Mint Product Offerings Among U.S. Mint Buyer Groups*

	Total U.S. Mint Customers			U.S. Mint Customers								
	9/03 (%)	11/02 (%)	9/01 (%)	<\$100			\$100-\$499			\$500+		
				9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)
U.S. Mint 50 State Quarters Program	98	95	95	98	94	94	98	96	97	96	97	98
Other U.S. Coins	92	91	78	91	89	76	95	93	81	88	97	89
Official U.S. Mint Coin Sets	98	94	98	98	94	97	98	94	98	95	98	99
Official U.S. Mint Commemorative Coin Sets	83	85	84	81	84	81	87	86	88	91	92	93
Antique U.S. Coins	30	30	8	30	32	9	29	27	6	36	27	8
Painted or Colorized U.S. Coins	26	29	12	30	35	15	21	20	6	7	14	7
Coin Jewelry/Gift Items	70	68	51	68	65	46	76	73	61	75	80	68
Thematic Commemorative Coins/Medallions	48	46	2	45	46	2	54	46	1	52	57	1
Official Foreign Coins	14	22	2	13	20	2	18	24	3	16	29	4
(Approximate Base)	(703)	(613)	(859)	(254)	(194)	(242)	(329)	(309)	(331)	(120)	(110)	(286)

* Does not sum to 100% due to multiple responses.
Source: Q.3a

Recognition of the U.S. Mint & Competitors... Product Recognition

THE MISTAKEN BELIEF THAT THE FRANKLIN MINT OFFERS OFFICIAL U.S. MINT 50 STATE QUARTERS, COIN SETS, AND COMMEMORATIVE COINS HAS NOT CHANGED APPRECIABLY BETWEEN SURVEYS

- U.S. Mint customers are less likely to make mistakes especially regarding coin sets and commemoratives compared to Non U.S. Mint customers

Table 15a
Familiarity with Franklin Mint Product Offerings
Among U.S. Mint Customers & Non-Customers*

	Total Sample			Total U.S. Mint Customers			Non-Mint Customers			
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	Wave 1B** 11/02 (%)	Wave 1A** 11/02 (%)	9/01 (%)	
U.S. Mint 50 State Quarters Program Quarters	46	43	24	33	33	10	46	48	41	24
Other U.S. Coins	60	58	30	41	41	18	60	61	56	30
Official U.S. Mint Coin Sets	52	49	34	27	32	15	52	53	46	35
Official U.S. Mint Commemorative Coin Sets	57	55	32	36	37	19	57	58	52	32
Coin Jewelry/Gift Items	54	56	32	62	56	34	54	56	57	32
Thematic Commemorative Coins/Medaillions	50	52	32	55	44	34	50	52	52	32
Painted or Colorized U.S. Coins	49	47	32	60	54	29	49	49	46	32
Antique U.S. Coins	42	44	22	36	34	15	42	46	43	22
Official Foreign Coins	27	26	15	32	26	11	27	22	28	15
(Approximate Base)	(1,503)	(1,410)	(1,190)	(703)	(611)	(859)	(800)	(318)	(480)	(331)

* Does not sum to 100% due to multiple responses.

** Wave 1A: Interviews prior to aa29/02 and Wave 1B: Interviews from 11/02-12/8/02.

Source: Q.3b

Recognition of the U.S. Mint & Competitors... Product Recognition

AS IN THE BENCHMARK SURVEY, ACCURATE KNOWLEDGE ABOUT THE FRANKLIN MINT'S COIN OFFERINGS INCREASES AS U.S. MINT SPENDING LEVELS RISE – HIGHER SPENDERS ARE LESS LIKELY TO BELIEVE OFFICIAL COINS COME FROM THE FRANKLIN MINT

Table 15b
Familiarity with Franklin Mint Product Offerings Among U.S. Mint Buyer Groups*

	Total U.S. Mint Customers			U.S. Mint Customers									
	9/03 (%)	11/02 (%)	9/01 (%)	<\$100			\$100-\$499						
				9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	
U.S. Mint 50 State Quarters Program Quarters	33	33	10	35	34	11	31	32	8	29	24	11	
Other U.S. Coins	41	41	18	42	46	20	38	32	13	29	27	17	
Official U.S. Mint Coin Sets	27	32	15	28	36	16	25	23	12	24	20	14	
Official U.S. Mint Commemorative Coin Sets	36	37	19	39	42	22	32	28	14	16	26	14	
Coin Jewelry/Gift Items	62	56	34	61	57	34	65	53	34	54	52	36	
Thematic Commemorative Coins/Medallions	55	44	34	56	44	33	54	44	34	51	47	45	
Painted or Colorized U.S. Coins	60	54	29	58	56	31	65	53	25	56	49	33	
Antique U.S. Coins	36	34	15	36	35	17	35	32	12	38	29	17	
Official Foreign Coins	32	26	11	32	26	10	31	24	14	39	31	17	
(Approximate Base)	(1,503)	(611)	(859)	(254)	(194)	(242)	(329)	(307)	(331)	(120)	(110)	(286)	

* Does not sum to 100% due to multiple responses.
Source: Q.3b

Recognition of the U.S. Mint & Competitors... Product Recognition

IN SUMMARY, U.S. MINT CUSTOMERS, ESPECIALLY WITH LOW AND MODERATE SPEND, ARE MORE ACCURATE IN IDENTIFYING THE FRANKLIN MINT'S PRODUCTS, WHILE ACCURACY REGARDING THE U.S. MINT'S PRODUCTS HAS REMAINED RELATIVELY STABLE

Table 16
Overall Product Recall Accuracy Among U.S. Mint Customers & Non-Customers*

	Total Sample		Total		U.S. Mint Customers						Non-Mint Customers	
	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	<\$100 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)
U.S. Mint**												
Complete Accuracy	1	1	11	7	11	6	11	9	16	12	1	1
Partial Accuracy	83	84	88	91	88	92	89	88	80	88	83	84
Inaccuracy	16	15	1	2	1	2	<1	2	4	0	16	15
The Franklin Mint**												
Complete Accuracy	1	<1	2	1	2	1	3	2	2	1	1	<1
Partial Accuracy	52	53	59	51	59	51	61	51	51	51	52	53
Inaccuracy	48	47	39	48	39	48	36	47	47	48	48	47
(Approximate Base)	(1,503)	(1,411)	(703)	(612)	(254)	(194)	(329)	(308)	(120)	(110)	(800)	(798)

* Accuracy is defined as follows: Complete = correctly identified all products offered by organization; Partial = correctly identified at least two, but not all products; Inaccurate = correctly identified only one product or no products.

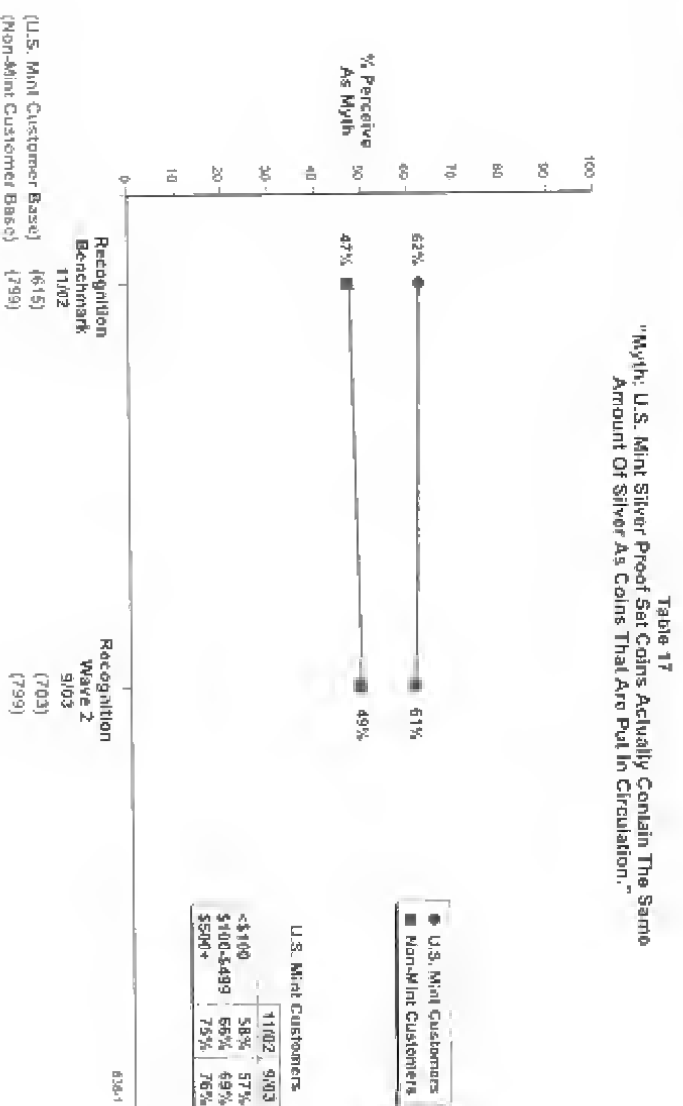
** May not sum to 100% due to rounding.

Source: Q.3a, Q.3b

Recognition of the U.S. Mint & Competitors... Overall Knowledge

THE SAME PERCENTAGE OF U.S. MINT AND NON-U.S. MINT CUSTOMERS KNOW THAT SILVER PROOF SET COINS DO NOT CONTAIN THE SAME AMOUNT OF SILVER AS COINS IN CIRCULATION AS IN THE BENCHMARK SURVEY

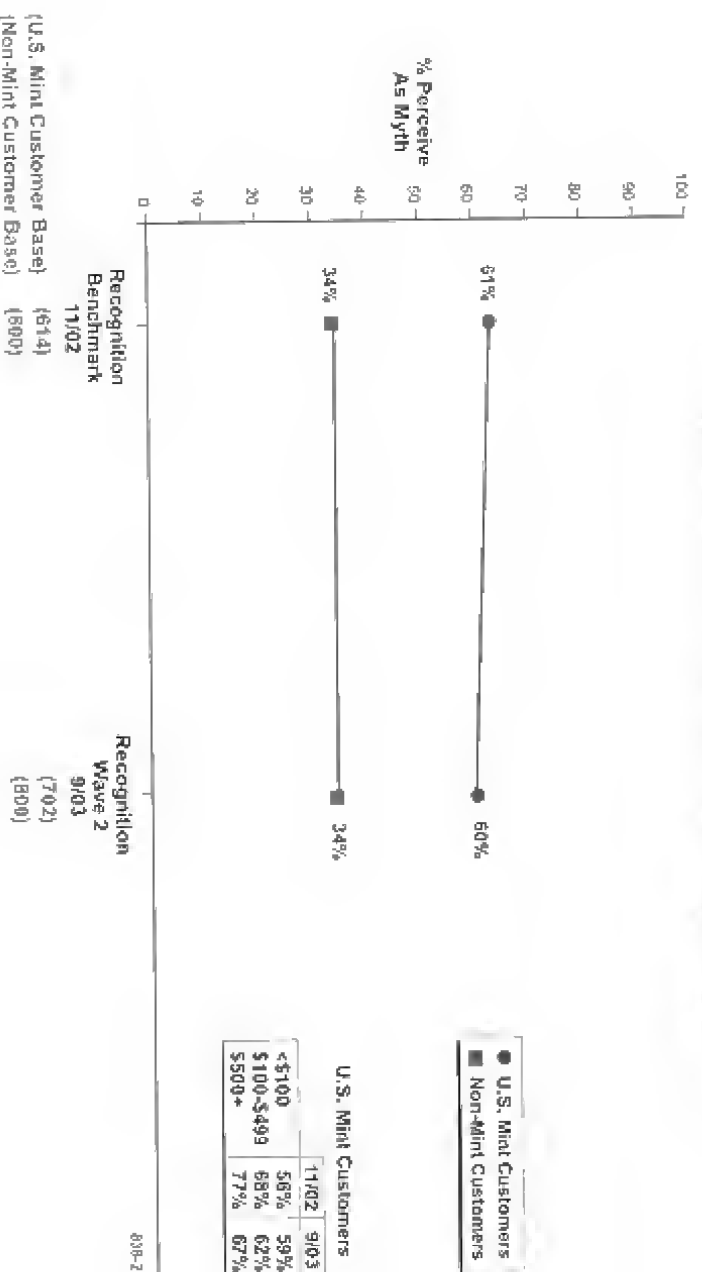
- The same is true for U.S. Mint customers of different spending levels



Recognition of the U.S. Mint & Competitors... Overall Knowledge

AWARENESS THAT THE QUALITY OF THE MARKINGS ON U.S. MINT PROOF SETS IS NOT THE SAME AS COINS IN CIRCULATION IS THE SAME OVERALL; HOWEVER IT HAS DECLINED AMONG MODERATE AND HIGH SPENDING U.S. MINT CUSTOMERS

Table 18
"Myth: The Quality Of The Markings Or Images On U.S. Mint Proof Sets Is The Same As That Found In Coins That Are Put In Circulation."

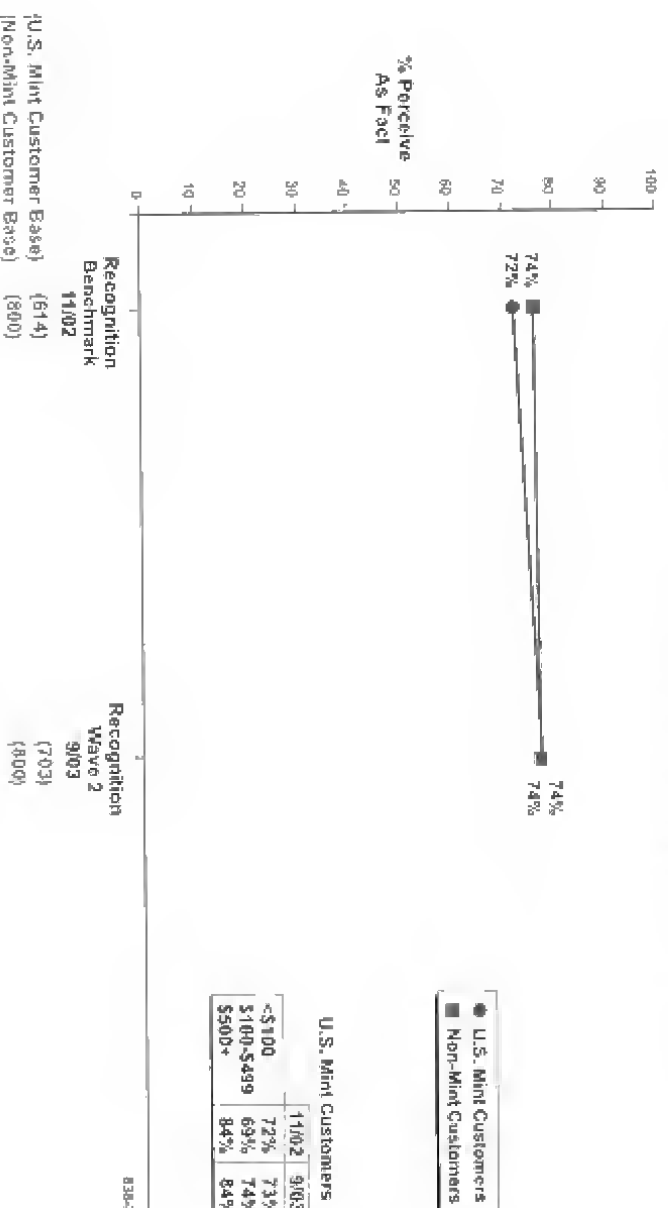


Recognition of the U.S. Mint & Competitors... Overall Knowledge

KNOWLEDGE THAT COMMEMORATIVE COINS PRODUCED BY THE U.S. MINT ARE LEGAL CURRENCY HAS REMAINED HIGH AMONG BOTH U.S. MINT CUSTOMERS AND NON-U.S. MINT CUSTOMERS AT 74%

- Misperceptions are growing slightly among moderate U.S. Mint spenders

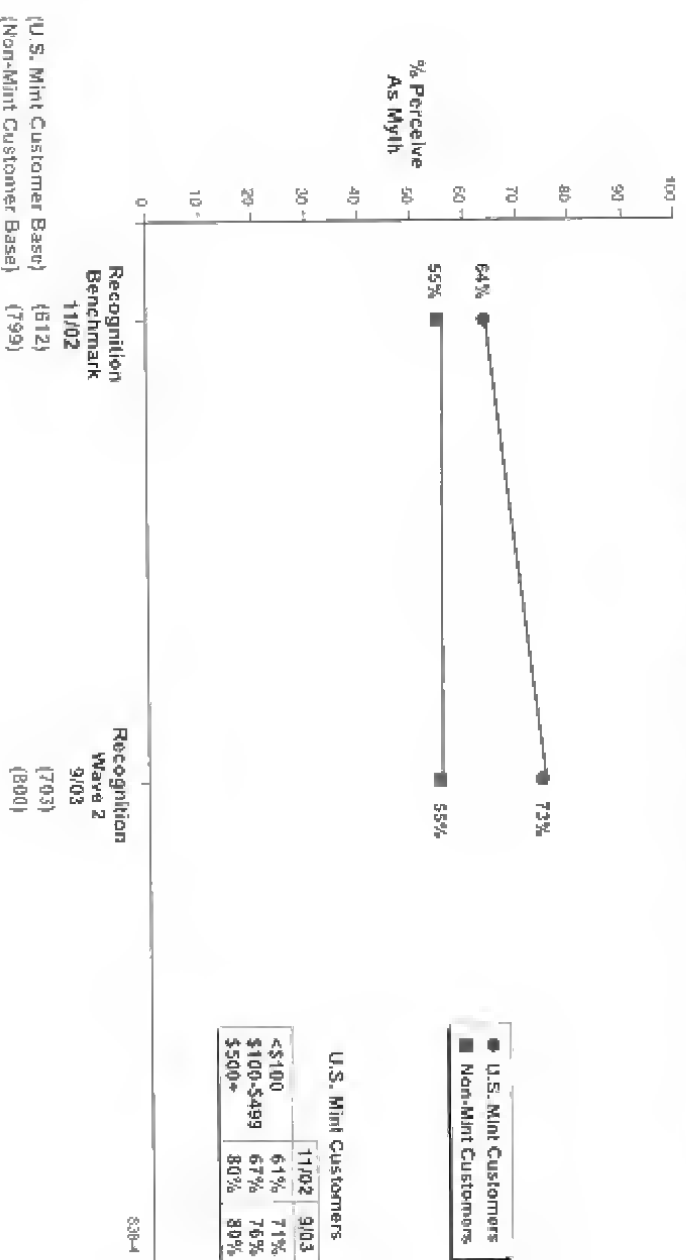
Table 19
"Fact: Commemorative Coins Produced By The U.S. Mint Are Legal Currency."



Recognition of the U.S. Mint & Competitors... Overall Knowledge

AWARENESS THAT COMMEMORATIVE COINS PRODUCED BY THE FRANKLIN MINT ARE NOT LEGAL CURRENCY HAS GROWN SUBSTANTIALLY AMONG U.S. MINT CUSTOMERS, PARTICULARLY LOW TO MODERATE SPENDERS

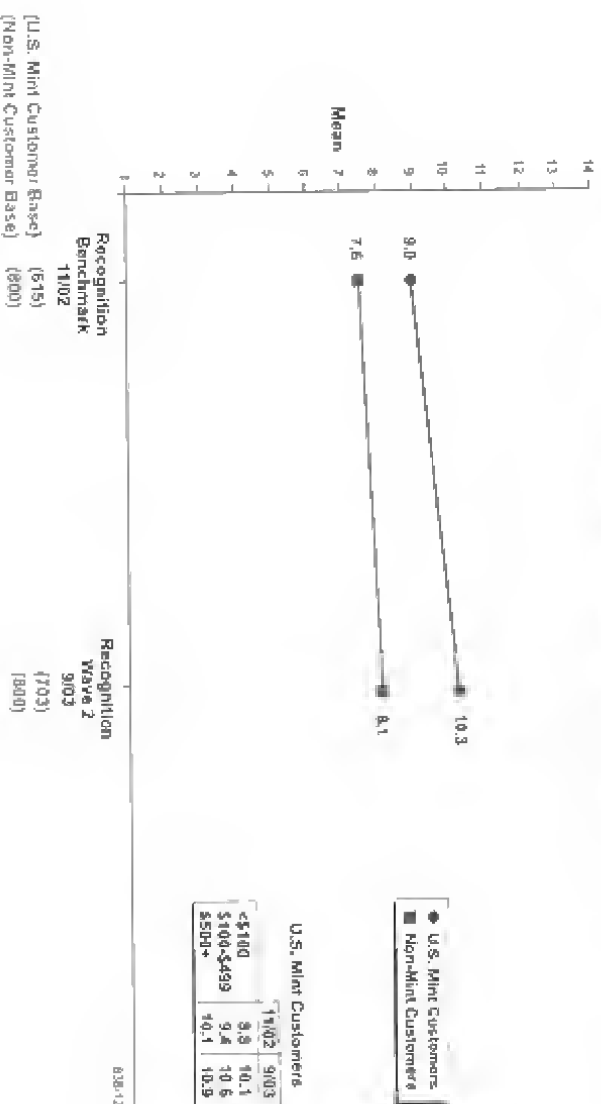
Table 20
"Myth: Commemorative Coins Produced By The Franklin Mint Are Legal Currency."



Recognition of the U.S. Mint & Competitors... Overall Knowledge

OVERALL KNOWLEDGE OF THE U.S. MINT IS INCREASING AMONG U.S. MINT CUSTOMERS, ESPECIALLY THOSE WITH LOW TO MODERATE SPENDING LEVELS, WHILE KNOWLEDGE AMONG NON-U.S. MINT CUSTOMERS HAS REMAINED RELATIVELY THE SAME

Table 21
Overall Knowledge Of The U.S. Mint Among U.S. Mint Customers & Non-U.S. Mint Customers *
(Mean # Correct Responses Overall)

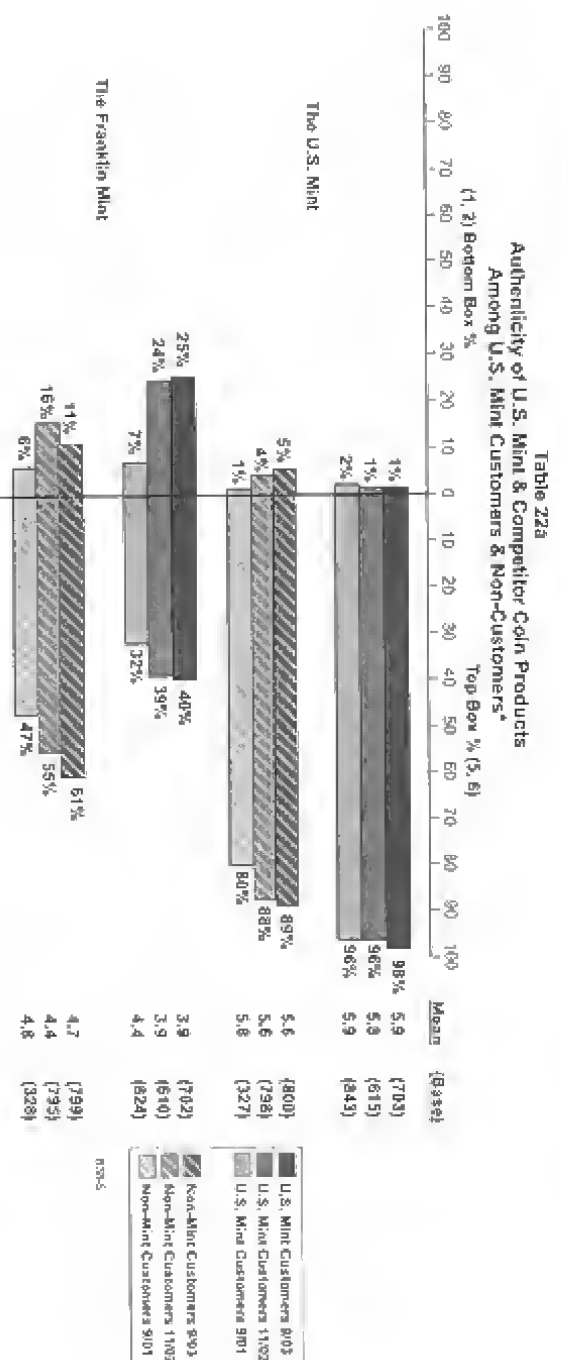


* Each correct response was given one point up to a maximum of 14 points. Knowledge of U.S. Mint products accounts for up to 9 points, mentioning the U.S. Mint as producing coin currency accounts for one point, and the remaining four points are associated with accurate knowledge of specific product features.
Source: Q.3a, Q.4, Q.5

Attitudes Towards The U.S. Mint & Competitors' Products... Authenticity

AS IN PREVIOUS SURVEYS, MORE U.S. MINT CUSTOMERS AND NON-U.S. MINT CUSTOMERS CONSIDER U.S. MINT PRODUCTS TO BE AUTHENTIC/GENUINE COMPARED TO THE FRANKLIN MINT

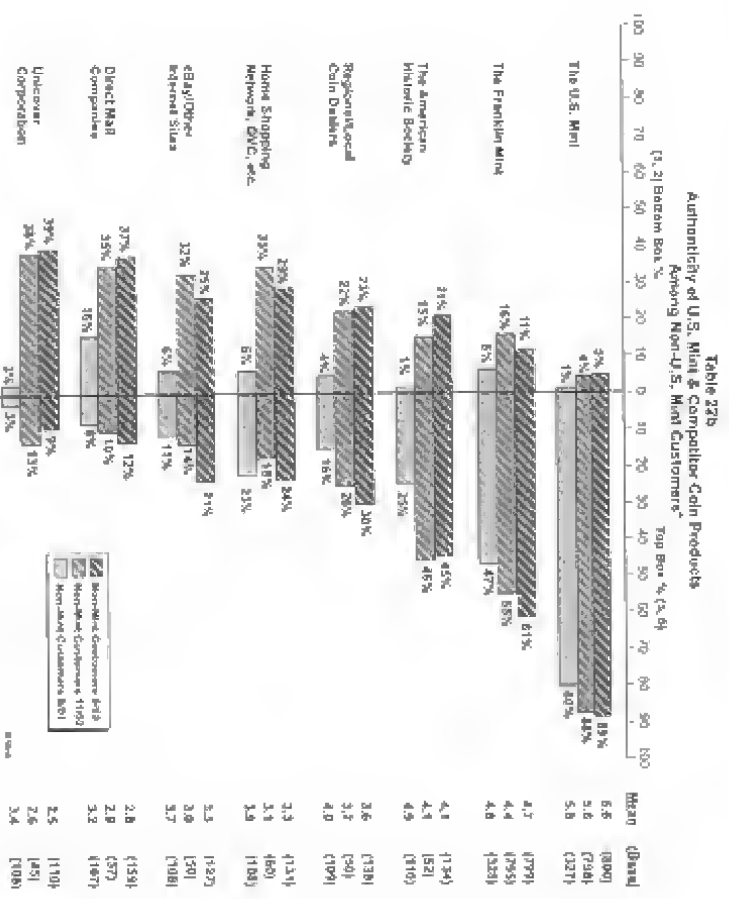
- Over time, The Franklin Mint's products are increasingly viewed as authentic among Non-U.S. Mint customers



* "Bottom Box" is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Not at all Authentic" and "6" means "Absolutely Authentic or Genuine."
Source: Q.13

Attitudes Towards The U.S. Mint & Competitors' Products... Authenticity

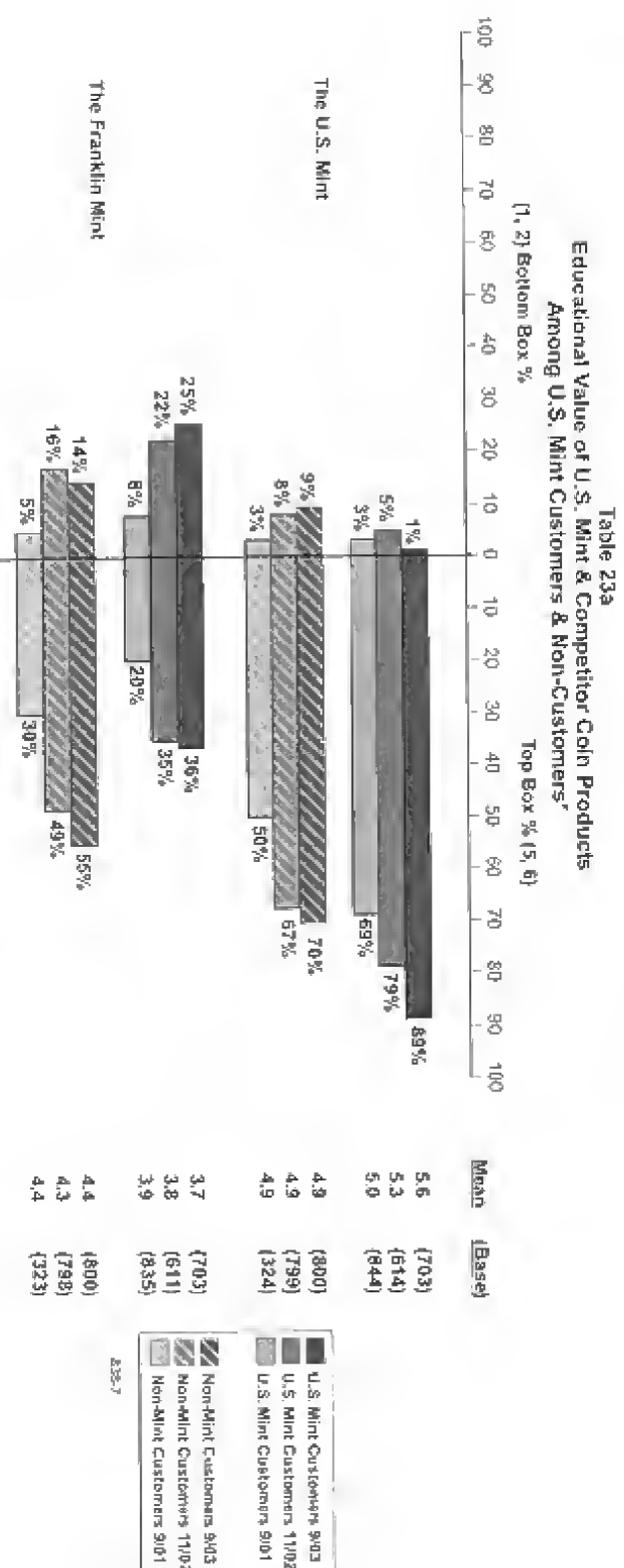
BELIEF IN THE AUTHENTICITY OF COINS OFFERED BY INTERNET SITES HAS GROWN SUBSTANTIALLY IN THE PAST YEAR, APPROACHING THE LEVEL OF AUTHENTICITY OFFERED BY ORGANIZATIONS SELLING VIA TELEVISION



* "Bottom Box" is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Not at all Authentic" and "6" means "Absolutely Authentic or Genuine."

Attitudes Towards The U.S. Mint & Competitors' Products... Educational Value

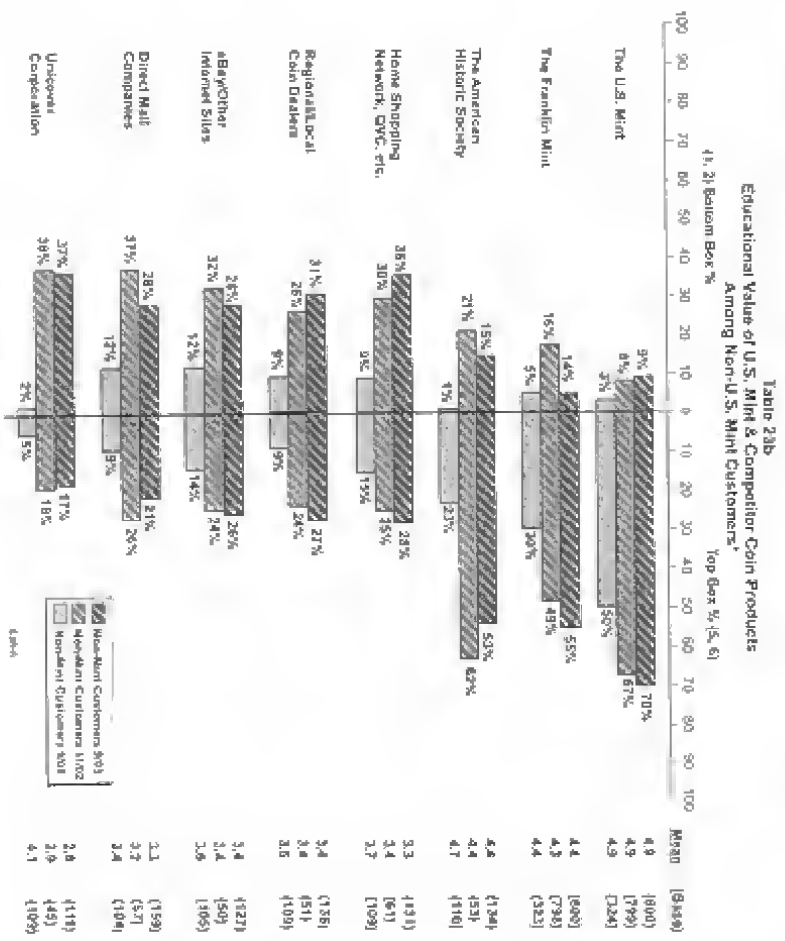
THE PERCEIVED EDUCATIONAL VALUE OF THE U.S. MINT'S COIN PRODUCTS HAS INCREASED TREMENDOUSLY AMONG U.S. MINT CUSTOMERS OVER THE PAST TWO YEARS



* "Bottom Box" is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Not Educational at all" and "6" means "Highly Educational."
Source: Q.16

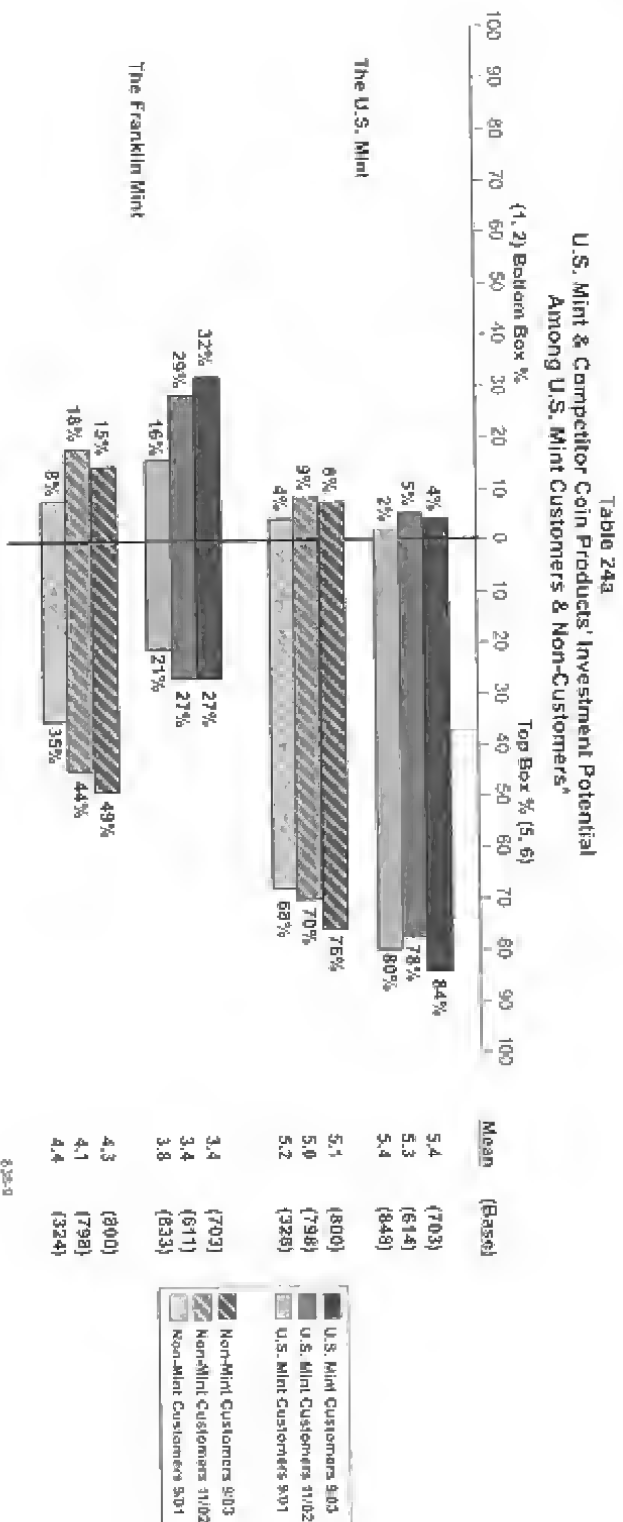
Attitudes Towards The U.S. Mint & Competitors' Products ... Educational Value

THE AMERICAN HISTORIC SOCIETY HAS LOST SOME OF ITS PERCEIVED EDUCATIONAL VALUE WHILE THE FRANKLIN MINT CONTINUES TO GAIN IN VALUE, ALTHOUGH IT REMAINS WELL BELOW THAT OF THE U.S. MINT



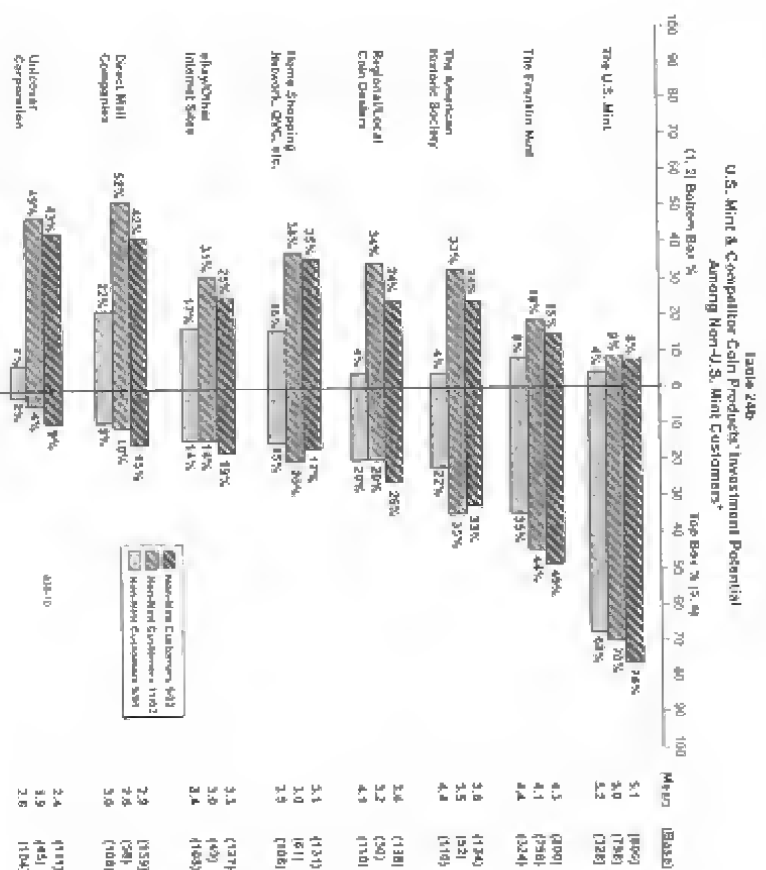
Attitudes Towards The U.S. Mint & Competitors' Products... Investment Potential

U.S. MINT PRODUCTS ARE INCREASINGLY SEEN AS A SOUND INVESTMENT AMONG U.S. MINT AND NON-U.S. MINT CUSTOMERS; ALTHOUGH NON-U.S. MINT CUSTOMERS ALSO SEE AN INCREASED INVESTMENT POTENTIAL IN THE FRANKLIN MINT'S PRODUCTS



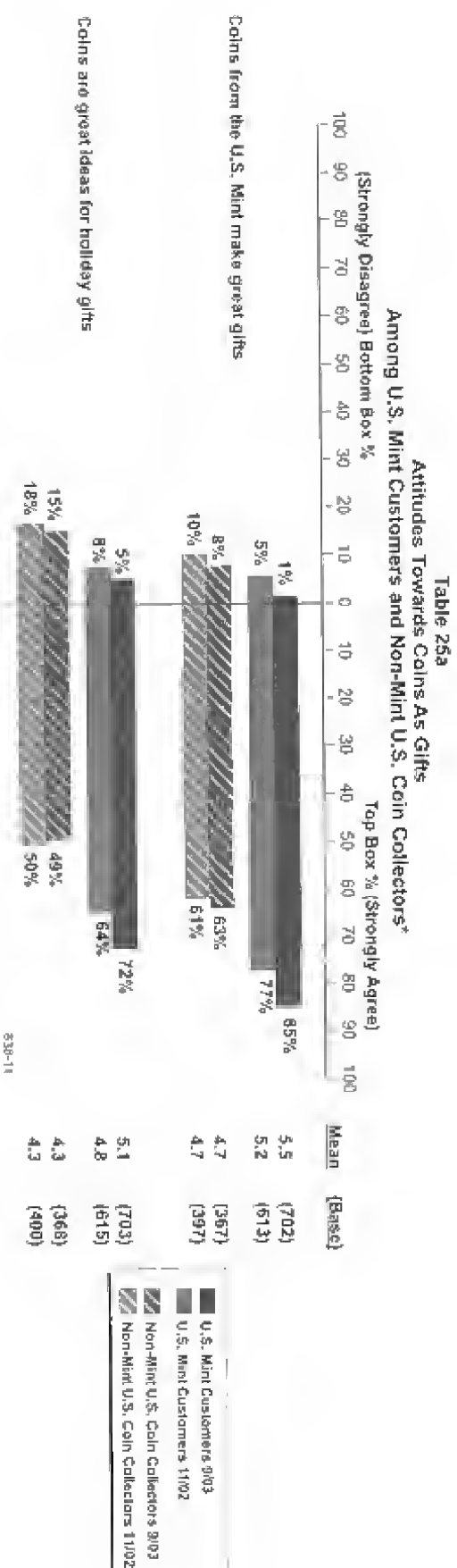
Attitudes Towards The U.S. Mint & Competitors' Products... Investment Potential

MANY NON-U.S. MINT COIN SOURCES ARE GAINING IN PERCEIVED INVESTMENT POTENTIAL, ALTHOUGH ALL REMAIN WELL BELOW THE U.S. MINT IN THEIR PERCEIVED INVESTMENT VALUE



Attitudes Towards Coins & Coin Collecting... Coins as Gifts

COINS ARE GAINING POPULARITY AMONG U.S. MINT CUSTOMERS AS GREAT GIFTS -- 85% AND 72% BELIEVING THEY MAKE GOOD GIFTS IN GENERAL AND FOR THE HOLIDAYS COMPARED TO 77% AND 64% IN THE BENCHMARK SURVEY



* "Bottom Box" is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.20

Attitudes Towards Coins & Coin Collecting... Coins as Gifts

AMONG U.S. MINT CUSTOMERS, ATTITUDES TOWARDS COINS AS GIFTS, PARTICULARLY U.S. MINT COINS, HAVE BECOME MORE FAVORABLE ACROSS ALL SPENDING LEVELS DURING THE PAST YEAR

- Not surprisingly, higher spending U.S. Mint customers are the most favorable

Table 25b
Attitudes Towards Coins as Gifts
Among U.S. Mint Customers by Buyer Status*

Among U.S. mint customers of 2001-2002

Statement	U.S. Mint Customers															
	Total U.S. Mint Customers				<\$100				\$100-\$499				\$500+			
	9/03		11/02		9/03		11/02		9/03		11/02		9/03		11/02	
	{%}	M	%	M	%	M	%	M	%	M	%	M	%	M	%	
Coins from the U.S. Mint make great gifts	85	5.5	77	5.2	83	5.4	74	5.1	89	5.6	81	5.3	94	5.7	89	5.6
Coins are great ideas for holiday gifts	72	5.1	64	4.8	69	5.0	62	4.7	76	5.2	68	4.9	80	5.2	79	5.3
(Approximate Base)	(702)		(615)		(254)		(195)		(328)		(310)		(120)		(110)	

* % = Top Box score (5,6) on a six-point scale where "1" means "Strongly Disagree" and "6" means "Agree Strongly"

Note: M=mean or average

Source: Q 20

Attitudes Towards Coins & Coin Collecting... Sources for Coins

THE U.S. MINT CONTINUES TO BE HIGHLY FAVORED AS AN ORGANIZATION FOR BUYING COINS FOR ONESELF, WHILE FAVOR FOR THE FRANKLIN MINT HAS DECLINED AMONG LOW SPENDING U.S. MINT CUSTOMERS

- Preference for the U.S. Mint as a source of gift coins continues to be much higher among U.S. Mint customers than Non-U.S. Mint customers

Table 26
Coin Gift Sources for Purchasing Coins for Self
Among U.S. Mint Customers & Non-Customers
(Aided Measure: Organization Think of First)

	Total Sample (%)		U.S. Mint Customers								Non-Mint Customers (%)		
	9/03 (%)	11/02 (%)	Total (%)	<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	Wave 1B* 11/02 (%)	Wave 1A* 11/02 (%)
The United States Mint	69	75	98	95	98	94	97	98	95	100	68	64	75
The Franklin Mint	19	25	1	5	1	6	2	2	0	0	20	22	25
Other Sources	12		1				1		5		12	14	
(Approximate Base)	(1,450)	(1,038)	(700)	(592)	(254)	(175)	(327)	(307)	(119)	(110)	(750)	(301)	(446)

* Wave 1A: Interviews prior to 11/29/02 and Wave 1B: Interviews from 11/29-12/6/02

Source: Q.12

Attitudes Towards Coins & Coin Collecting... Sources for Coins

PREFERENCE FOR THE U.S. MINT AS A SOURCE FOR COIN GIFTS FOR CHILDREN IS AS HIGH AS IT IS FOR COINS FOR ONESELF; THE U.S. MINT IS STILL THOUGHT OF BEFORE ALL OTHER ORGANIZATIONS EVEN AMONG NON-U.S. MINT CUSTOMERS

- Two-fifths (40%) of Non-U.S. Mint customers continue to think of a company other than the U.S. Mint for purchasing coins for a child

Table 27
Coin Gift Sources for Purchasing Coins as a Gift for a Child
Among U.S. Mint Customers & Non-Customers
(Aided Measure: Organization Think of First)

	Total Sample (%)		U.S. Mint Customers								Non-Mint Customers			
	9/03 (%)	11/02 (%)	Total (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	Wave 1B* 11/02 (%)	Wave 1A* 11/02 (%)		
The United States Mint	60	68	95	93	95	92	96	95	99	99	60	59	68	
The Franklin Mint	24	32	4	7	4	8	3	5	0	1	24	25	32	
Other Sources	16		1		2		1		1		16	16		
(Approximate Base)	(1,423)	(1,007)	(683)	(570)	(249)	(167)	(319)	(299)	(115)	(104)	(740)	(301)	(437)	

* Wave 1A: Interviews prior to 11/29/02 and Wave 1B: Interviews from 11/29-12/8/02
Source: Q.12

Attitudes Towards Coins & Coin Collecting... Sources for Coins

SIMILAR TO COIN GIFTS FOR CHILDREN, THE U.S. MINT STILL RECEIVES THE HIGHEST PERCENTAGE OF "FIRST MENTIONS" AS A SOURCE FOR COIN GIFTS FOR ADULTS

- As in 2002, two-fifths (40%) of non-U.S. Mint customers would choose a company other than the U.S. Mint for purchasing coins for an adult when asked to choose among the U.S. Mint, Franklin Mint, or one other source

Table 28

Aided Awareness of U.S. Mint & Competitors for Purchasing Coins as a Gift for an Adult
Among U.S. Mint Customers & Non-Customers
(Aided Measure: Organization Think of First)

	Total Sample (%)	9/03 (%)	11/02 (%)	U.S. Mint Customers						Non-Mint Customers (%)		
				Total (%)	<\$100 (%)	\$100-\$499 (%)	\$500+ (%)	9/03 (%)	11/02 (%)	9/03 (%)	Wave 1B* 11/02 (%)	Wave 1A* 11/02 (%)
The United States Mint	60	68	95	93	94	91	96	95	94	98	60	60
The Franklin Mint	26	32	4	7	4	9	2	5	1	2	26	27
Other Sources	14		2		2		1		6		14	13
(Approximate Base)	(1,442)	(1,018)	(687)	(575)	(248)	(168)	(322)	(301)	(117)	(106)	(755)	(302)
												(443)

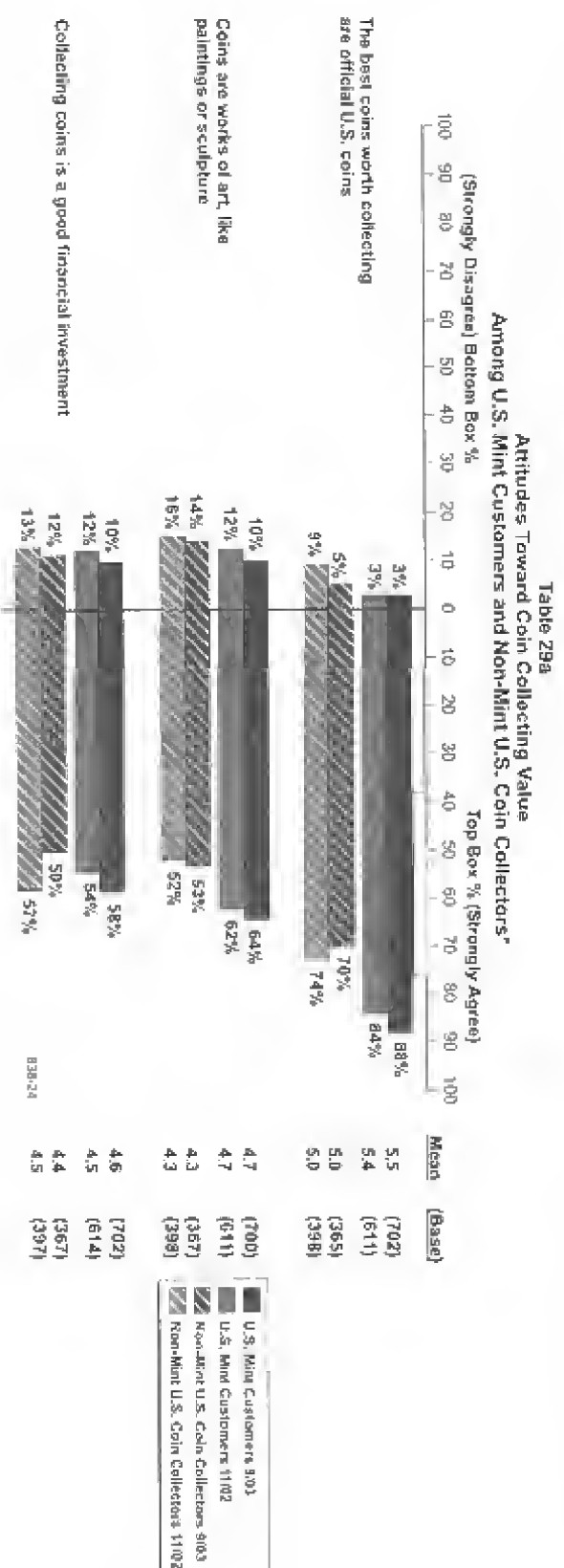
* Wave 1A: Interviews prior to 11/29/02 and Wave 1B: Interviews from 11/29-12/8/02.

Source: Q.12

Attitudes Towards Coins & Coin Collecting... Value

THE VAST MAJORITY OF U.S. MINT AND NON-U.S. MINT COIN COLLECTORS STILL PERCEIVE THAT THE BEST COINS WORTH COLLECTING ARE OFFICIAL U.S. COINS -- NO CHANGES BETWEEN SURVEY WAVES ARE EVIDENT

- The rationale for this belief lies in the fact that more than one-half of those surveyed see coins as works of art and having long-term financial value



* Bottom Box is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.20

Attitudes Towards Coins & Coin Collecting... Value

AMONG EXISTING U.S. MINT CUSTOMERS, \$500+ BUYERS ARE MORE LIKELY THIS YEAR THAN LAST YEAR TO HAVE ADOPTED THE VIEW THAT COLLECTING COINS IS A GOOD FINANCIAL INVESTMENT

- The same is true for moderate spenders

Table 29b
Attitudes Towards Coin Collecting Value Among U.S. Mint Customers by Buyer Status*

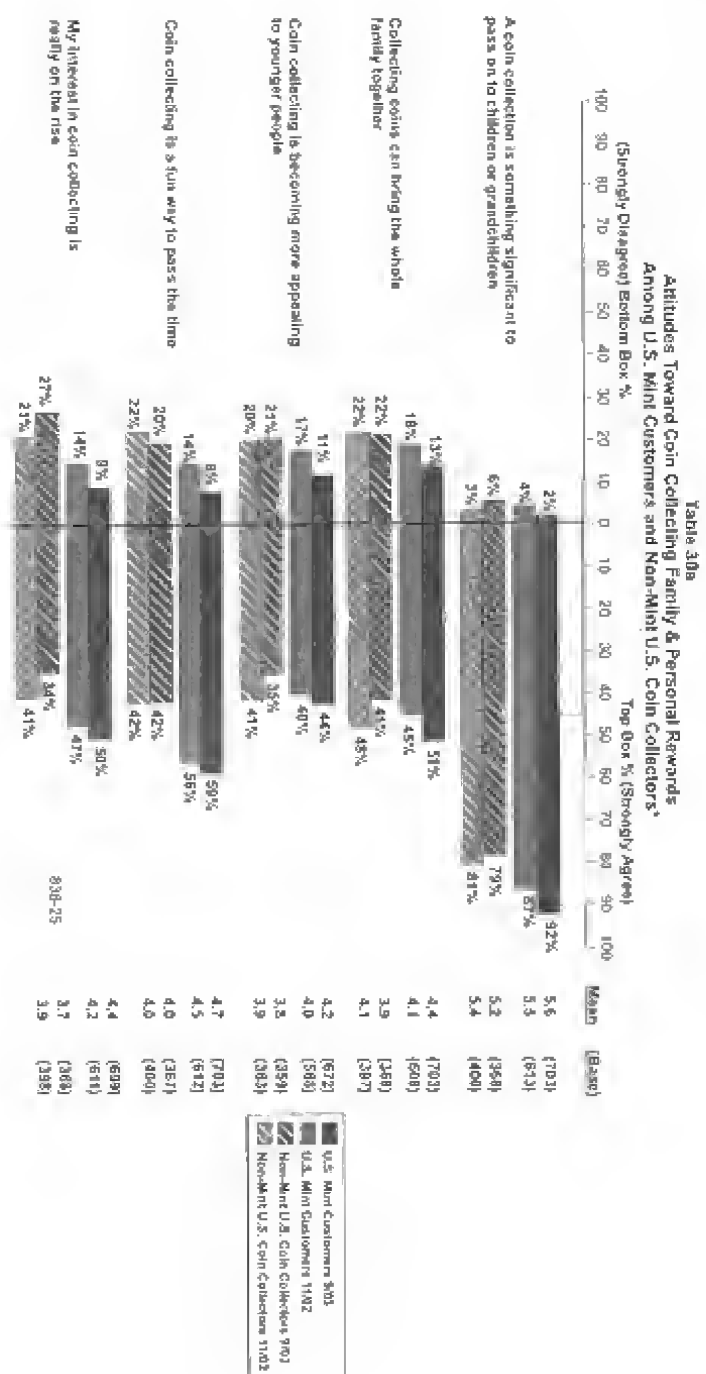
Statement	U.S. Mint Customers											
	Total U.S. Mint Customers				<\$100				\$100-\$499			
	9/03		11/02		9/03		11/02		9/03		11/02	
	(%)	M	%	M	%	M	%	M	%	M	%	M
The best coins worth collecting are official U.S. coins	88	5.5	84	5.4	86	5.5	82	5.4	92	5.7	84	5.5
Coins are works of art like paintings or sculpture	64	4.7	62	4.7	62	4.7	60	4.6	64	4.7	65	4.8
Collecting coins is a good financial investment	58	4.6	54	4.5	56	4.5	52	4.4	63	4.8	56	4.6
(Approximate Base)	(700)		(615)		(252)		(195)		(328)		(310)	
											(120)	(110)

* Percent = "Top Box" score of "5" or "6" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."

Source: Q 20

Attitudes Towards Coins & Coin Collecting... Family & Personal Rewards

ATTITUDES REGARDING THE FAMILIAL BENEFITS OF COIN COLLECTING ARE BECOMING SLIGHTLY MORE FAVORABLE AMONG U.S. MINT CUSTOMERS AND SLIGHTLY LESS FAVORABLE AMONG NON-U.S. MINT COIN COLLECTORS



* * Bottom Box is a response of "1" or "2" and Top Box is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.20

Attitudes Towards Coins & Coin Collecting... Family & Personal Rewards

PROPORTIONATELY FEWER U.S. MINT CUSTOMERS IN THIS SURVEY INDICATE THAT THEIR INTEREST IN COIN COLLECTING IS RISING; HOWEVER, MORE OF THEM FIND COIN COLLECTING A FUN WAY TO PASS THE TIME

- \$500+ customers have also shown an increase in the belief that coin collecting is becoming more appealing to younger people and can bring the whole family together

Table 30b
Attitudes Toward Coin Collecting Family & Personal Rewards
Among U.S. Mint Customers by Buyer Status*

Statement	U.S. Mint Customers											
	Total U.S. Mint Customers				<\$100				\$100-\$499			
	9/03		11/02		9/03		11/02		9/03		11/02	
	(%)	M	%	M	%	M	%	M	%	M	%	M
A coin collection is something significant to pass on to children or grandchildren	92	5.6	87	5.5	91	5.6	87	5.4	92	5.7	88	5.5
Collecting coins can bring the whole family together	51	4.4	45	4.1	51	4.4	43	4.1	50	4.4	45	4.1
Coin collecting is becoming more appealing to younger people	44	4.2	40	4.0	41	4.1	39	3.9	45	4.3	41	4.1
Coin collecting is a fun way to pass the time	59	4.7	47	4.2	54	4.6	43	4.1	67	4.9	52	4.5
My interest in coin collecting is really on the rise	50	4.4	56	4.5	47	4.3	53	4.4	53	4.6	60	4.6
(Approximate Base)	(703)		(615)		(254)		(195)		(329)		(310)	
											(120)	(110)

* "Bottom Box" is a response of "1" or "2" and "Top Box" is a response of "5" or "6" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.20

Coin & Coin-Related Behaviors... Past Coin Purchases

AS IN THE PRIOR SURVEY, MORE THAN HALF OF U.S. MINT CUSTOMERS AND OVER ONE-THIRD OF NON-MINT U.S. COIN COLLECTORS HAVE PURCHASED COINS FROM REGIONAL OR LOCAL COIN DEALERS

- There are no differences in past coin purchases from the U.S. Mint or the Franklin Mint compared to the Benchmark Survey

Table 31a
Prior Coin Purchasing Behaviors Among U.S. Mint Customers & Non-Mint U.S. Coin Collectors
Who Ever Purchased Coins*

	Total U.S. Mint Customers			Non-Mint U.S. Coin Collectors		
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)
% Who Have Ever Made a Purchase From Each Organization						
U.S. Mint	100	100	100	32	30	26
Franklin Mint	37	32	16	22	23	19
Regional or Local Coin Dealers	60			37	**	24
Companies Offering Coins in Direct Mail/ Newspapers/Magazine Ads	46			21	12	28
Internet Auction Sites (e.g., eBay)	24			7	13	5
TV Shopping Programs (e.g., Home Shopping Network, QVC)	18			21	4	17
American Historic Society	10			6	14	3
Unicover Corporation	5			2	**	0
(U.S. Mint/Franklin Mint Base)	(703)	(573)	(859)	(368)	(383)	(139)
(Approximate Base)	(115)				(28)	(46)

* Does not sum to 100% due to multiple responses.

** Sample sizes are too small to report.

Source: Q.16

Coin & Coin-Related Behaviors... Past Coin Purchases

**U.S. MINT CUSTOMERS (ESPECIALLY MODERATE AND HIGH SPENDERS)
HAVE SHOWN A SIZABLE INCREASE IN PURCHASING FROM THE FRANKLIN
MINT OVER THE PAST TWO YEARS**

Table 31b
Past Coin Purchasing Behaviors Among U.S. Mint Customers by Spending Levels
Who Ever Purchased Coins*

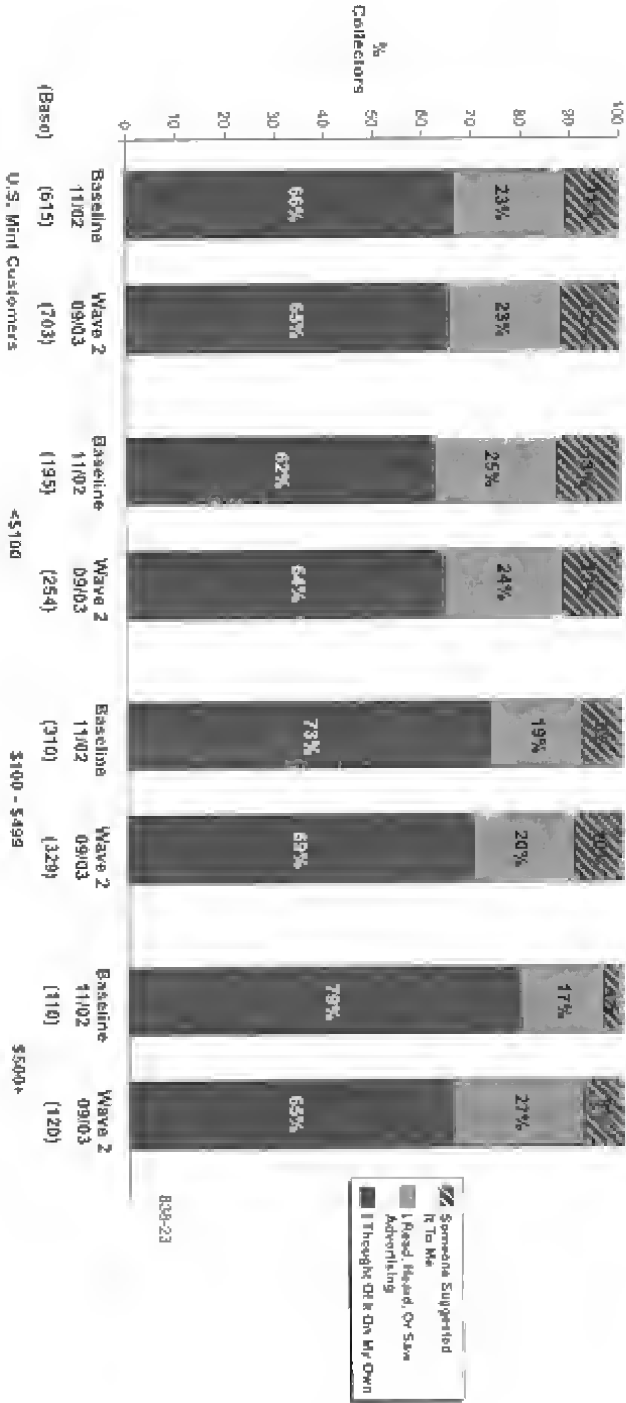
% Who Have Ever Made a Purchase From Each Organization	Total U.S. Mint Customers			U.S. Mint Customers								
	9/03 (%)	11/02 (%)	9/01 (%)	<\$100			\$100-\$499					
				9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)
U.S. Mint	100	100	100	100	100	100	100	100	100	100	100	100
Franklin Mint	37	32	16	34	32	14	42	30	20	52	38	22
(Approximate Base)	(703)	(573)	(859)	(254)	(179)	(242)	(329)	(281)	(331)	(120)	(103)	(286)

* Does not sum to 100% due to multiple responses.
Source: Q.16

Coin & Coin-Related Behaviors... Past Coin Purchases

THE IMPETUS TO MAKE A PURCHASE FROM THE U.S. MINT HAS REMAINED STEADY BETWEEN WAVES OVERALL; \$500+ CUSTOMERS ARE NOW MORE LIKELY TO BE RESPONDING TO EXTERNAL INFLUENCES

Table 32
Trigger For Past Coin Purchases
Among U.S. Mint Customers and Non-Mint U.S. Coin Collectors
Who Ever Purchased Coins



Coin & Coin-Related Behaviors... Future Coin Purchases

THE PERCENTAGE OF NON-U.S. MINT COIN COLLECTORS WHO EXPECT TO PURCHASE COINS NEXT YEAR HAS DECREASED; LOW SPEND BUYERS NOW SHOW MORE INTEREST IN BUYING PROOF AND UNCIRCULATED COINS

Table 33
Future U.S. Mint Coin Purchases Among U.S. Mint and Non-Mint U.S. Coin Collectors

% Who Would Seriously Consider Buying Item in Next 12 Months	Total U.S. Coin Collectors		Total U.S. Mint Customers		U.S. Mint Customers						Non-U.S. Mint Coin Collectors	
	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	<\$100		\$100-\$499		\$500+		9/03 (%)	11/02 (%)
					9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)		
Any quarters	59	63	93	89	92	88	96	92	98	89	59	62
Any proofs/uncirculated coins	43	47	94	86	92	84	96	90	97	98	43	46
Any commemoratives	36	40	50	50	44	46	56	54	70	71	36	40
Any recent U.S. Mint coins	51	57	72	74	67	70	82	78	88	93	51	57
Proofs/uncirculated only	0	0	1	1	2	2	<1	1	0	1	<1	0
Commemoratives only	1	<1	0	<1	0	0	0	1	<1	1	1	<1
Q50 quarters only	6	6	2	2	2	3	1	1	2	0	6	6
Recent U.S. Mint coins only	1	1	0	<1	0	0	0	<1	0	0	1	1
Proofs/uncs and quarters only	1	<1	7	7	8	8	4	6	4	1	1	<1
Commemoratives and quarters only	1	<1	0	0	0	0	0	0	0	0	1	<1
Recent U.S. coins and quarters only	1	1	<1	1	<1	1	0	1	0	0	1	1
Proofs/uncs, commemoratives, and quarters only	0	<1	2	2	3	2	1	1	0	0	<1	<1
Proofs/uncs, commemor., quarters, recent coins only	2	1	5	4	5	4	6	5	2	4	2	1
Any coin product but No U.S. Mint coins	7	7	<1	<1	<1	0	0	1	0	0	7	7
No U.S. Mint coins or coin products	27	18	1	2	2	2	0	2	0	0	28	18
(Approximate Base)	(1,071)	(1,015)	(703)	(615)	(254)	(195)	(329)	(310)	(120)	(110)	(368)	(400)

Source: Q.18

Coin & Coin-Related Behaviors... Future Coin Purchases

COMPARED WITH THE BENCHMARK SURVEY, MORE U.S. MINT CUSTOMERS AT ALL SPENDING LEVELS EXPECT TO INCREASE THEIR SPENDING WITH THE U.S. MINT OVER THE NEXT YEAR

- The biggest percentage increase is noted for \$500+ buyers who went from 18% in 2002 to 30% in 2003

Table 34
Expected Increase in Spending at Selected Organizations in Next 12 Months Among U.S. Mint Customers

% Expecting to Maintain/Increase Spending at Each Organization in Next 12 Months	Total U.S. Mint Customers				U.S. Mint Customers									
					<\$100		\$100-\$499		\$500+					
	Increase		Stay the Same		Increase		Stay the Same		Increase		Stay the Same		Increase	
	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)
The U.S. Mint	20	13	77	83	19	12	79	83	21	13	76	83	30	18
(Approximate Base)	(703)	(615)	(703)	(615)	(254)	(195)	(254)	(195)	(329)	(310)	(329)	(310)	(120)	(110)
The Franklin Mint	7	4	70	74	6	--*	75	--	9	--	65	--	--	--
(Approximate Base)	(111)	(71)	(111)	(71)	(42)		(42)		(52)		(52)			

* Sample sizes are too small to report.
Source: Q.17

Coin & Coin-Related Behaviors... Website Activity

U.S. MINT WEBSITE VISITATION HAS INCREASED AMONG U.S. MINT CUSTOMERS OF ALL SPENDING LEVELS OVER THE PAST YEAR, WITH NEARLY TWO-THIRDS OF CUSTOMERS INDICATED THEY VISITED THE MAIN WEBSITE

- The \$500+ buyers are the most prevalent users of the main website as well as the children's site (H.I.P. Pocket Change)
- Visitation of the children's site (H.I.P. Pocket Change) has remained constant over the past year overall
 - \$500+ buyers have shown an increase – from 22% to 31% now

Table 35a
Use of U.S. Mint Website Among U.S. Mint Customers & Non-U.S. Mint Customers

	Total U.S. Mint Customers			U.S. Mint Customers										Non-Mint Customers	
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	
Visited U.S. Mint Website															
Visited the main website	63	49	54	62	44	49	66	57	62	69	55	66	8	9	
(Base)	(703)	(614)	(858)	(254)	(195)	(242)	(329)	(309)	(330)	(120)	(110)	(286)	(800)	(797)	
Visited H.I.P. Pocket Change*	18	19	NA**	15	15	NA	21	24	NA	31	22	NA	10	10	
(Base)	(461)	(326)		(156)	(88)		(215)	(180)		(91)	(58)		(68)	(69)	

* Among those who have visited the main website.

** Not asked.

Source: Q.30n, Q.31, Q.32, Q.33

Coin & Coin-Related Behaviors... Website Activity

NON-U.S. MINT CUSTOMERS HAVE INCREASED THEIR USE OF THE U.S. MINT WEBSITE FOR OBTAINING INFORMATION ON COIN COLLECTING, ALTHOUGH THE GREATEST USE OF THE WEBSITE AMONG BOTH GROUPS CONTINUES TO BE PRODUCT-RELATED INFORMATION

Table 35b
Use of U.S. Mint Website Among U.S. Mint Customers & Non-U.S. Mint Customers

	Total U.S. Mint Customers			U.S. Mint Customers									Non-Mint Customers	
				<\$100			\$100-\$499			\$500+				
	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)	9/01 (%)	9/03 (%)	11/02 (%)
Use of U.S. Mint Website														
Browsed product offerings	88	88	90	85	86	86	92	88	96	96	98	98	56	58
Obtained information about products	87	84	84	86	80	81	90	90	88	92	92	97	64	62
Obtained information about coin collecting	55	58	22	51	56	21	59	59	22	73	70	36	55	48
Obtained information about their operations or history	42	37	37	40	28	37	45	49	36	51	62	46	30	39
Obtained educational information about coins for children	21	20	NA*	18	22	NA	25	18	NA	24	19	NA	23	32
Purchased products	85	83	83	83	78	83	88	88	83	93	94	89	25	22
(Base)	(462)	(325)	(508)	(157)	(88)	(118)	(215)	(180)	(186)	(90)	(58)	(192)	(68)	(69)

* Not asked
Source: Q.30h, Q.31, Q.32, Q.33

Coin & Coin-Related Behaviors... Website Activity

USE OF THE FRANKLIN MINT WEBSITE HAS DECREASED AMONG NON-U.S. MINT CUSTOMERS, ALTHOUGH THE PERCENTAGE OF THOSE WHO PURCHASE PRODUCTS WHEN VISITING THE SITE HAS INCREASED

Table 36a
Use of Franklin Mint Website Among U.S. Mint Customers & Non-U.S. Mint Customers

	Total U.S. Mint Customers		Non-Mint Customers	
	9/03 (%)	11/02 (%)	9/03 (%)	11/02 (%)
Visited Franklin Mint Website*				
Visited the main website	12	13	5	11
(Base)	(703)	(424)	(800)	(561)
Use of Website**				
Obtained information about products	47	48	64	62
Browsed product offerings	55	46	57	58
Obtained information about coin collecting	33	35	46	43
Obtained educational information about coins for children	10	15	21	32
Obtained information about their operations or history	20	13	21	36
Purchased products	24	23	31	21
(Base)	(85)	(54)	(41)	(53)

* Among those who have Internet access.
 ** Among those who have visited the website.
 Source: Q.30I, Q.34

Coin & Coin-Related Behaviors... Purchasing Methods

THE INTERNET HAS BECOME THE METHOD OF CHOICE FOR ALL U.S. MINT CUSTOMER SEGMENTS -- MORE THAN 40% PLACED THEIR MOST RECENT ORDER THIS WAY

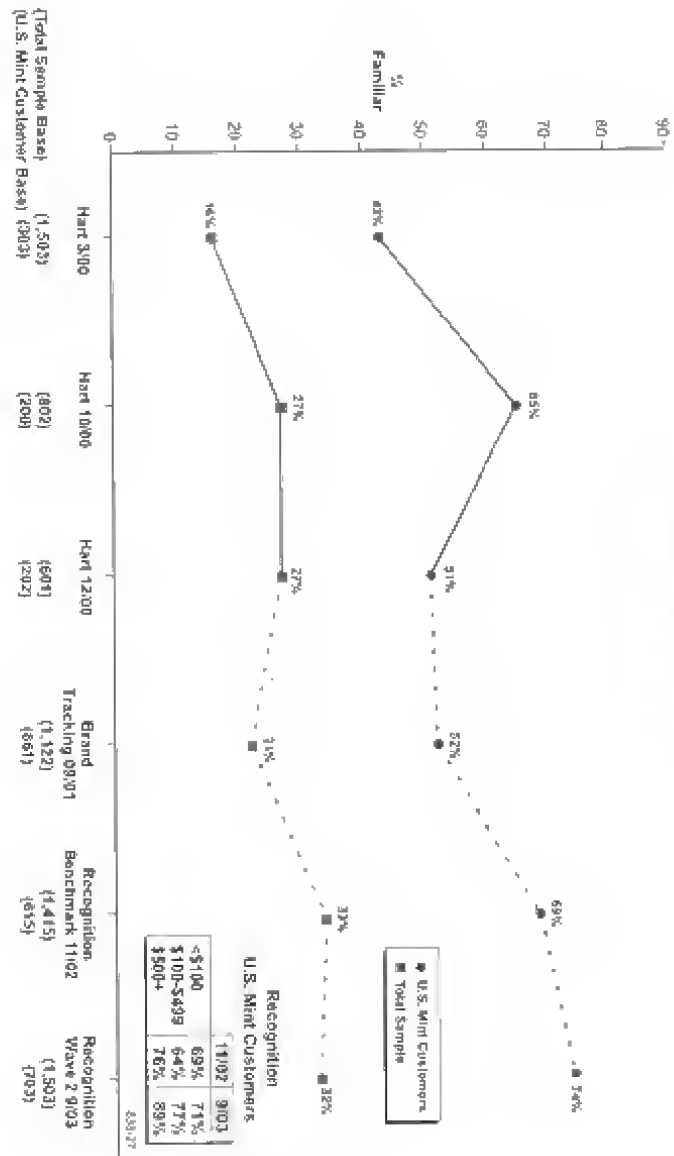
Table 36b
Method of Most Recent U.S. Mint Order Placement by Customer Status

Method of Most Recent U.S. Mint Order Placement	Total U.S. Mint Customers (%)	U.S. Mint Customers		
		<\$100 (%)	\$100-\$499 (%)	\$500+ (%)
Internet	41	40	43	45
Mail	34	34	34	28
Phone	24	25	22	24
Fax	1	0	0	1
(Base)	(1,192)	(793)	(332)	(67)

Q50 Awareness, Attitudes & Behaviors... Program Familiarity

Q50 PROGRAM FAMILIARITY CONTINUED TO INCREASE AMONG U.S. MINT CUSTOMERS, PARTICULARLY THOSE WITH MODERATE TO HIGH SPENDING, WHILE FAMILIARITY AMONG NON-U.S. MINT CUSTOMERS REMAINED STABLE

Table 37
Familiarity With Q50 Program*

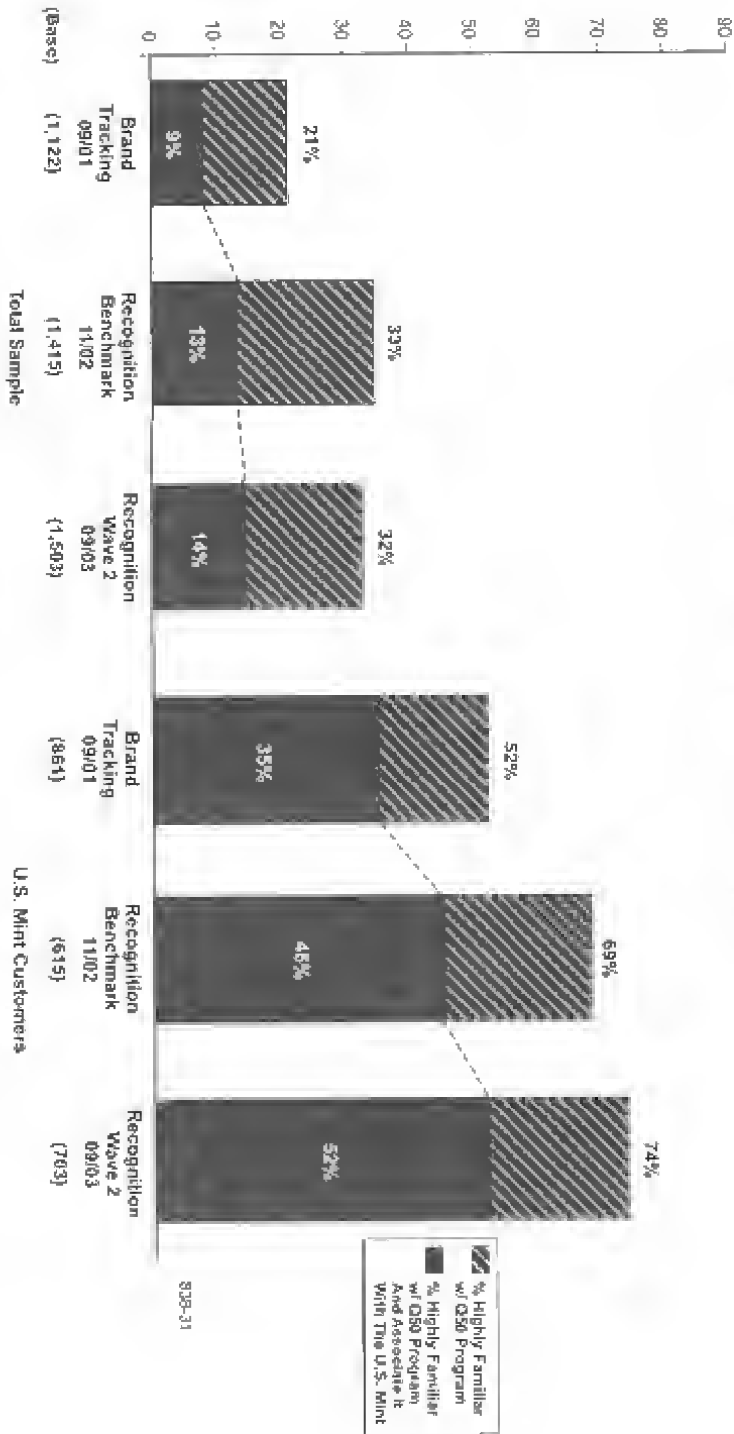


* Percentages are Top Box results ("5" for Hart; "6" for tracking and baseline) on a scale from "1" to "5" ("6" where "1" means "Read or Heard Nothing At All" and "5" ("6") means "Read or Heard a Great Deal."
Source: Q.2; Brand Tracking Q.55, Q.56; Hart Q.3

Q50 Awareness, Attitudes & Behaviors... Program Familiarity

IN ADDITION, U.S. MINT CUSTOMERS' RECOGNITION OF THE U.S. MINT'S SPONSORSHIP OF THE Q50 PROGRAM HAS SHOWN A STEADY INCREASE OVER THE PAST TWO YEARS AMONG ITS CUSTOMERS

Table 38
Association of Q50 Program With The U.S. Mint*

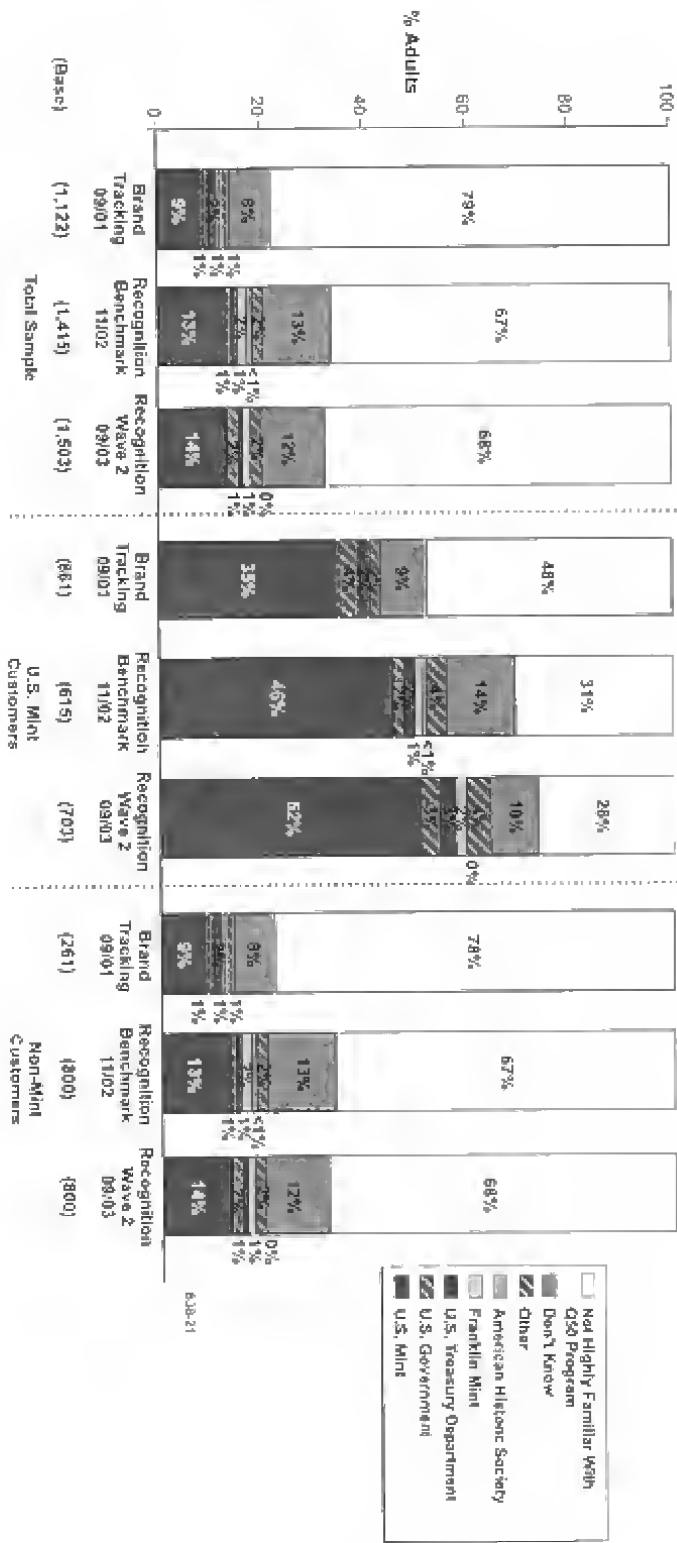


* Percentages are Top Box results ("6") on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
 Source: Q.2a; Brand Tracking Q.55, Q.56, Q.56a

Q50 Awareness, Attitudes & Behaviors... Program Familiarity

NON-U.S. MINT CUSTOMERS, ON THE OTHER HAND, HAVE NOT SHOWN AN INCREASE IN AWARENESS THAT THE Q50 PROGRAM IS SPONSORED BY THE U.S. MINT

Table 39a
Association Of The Q50 Program With The U.S. Mint

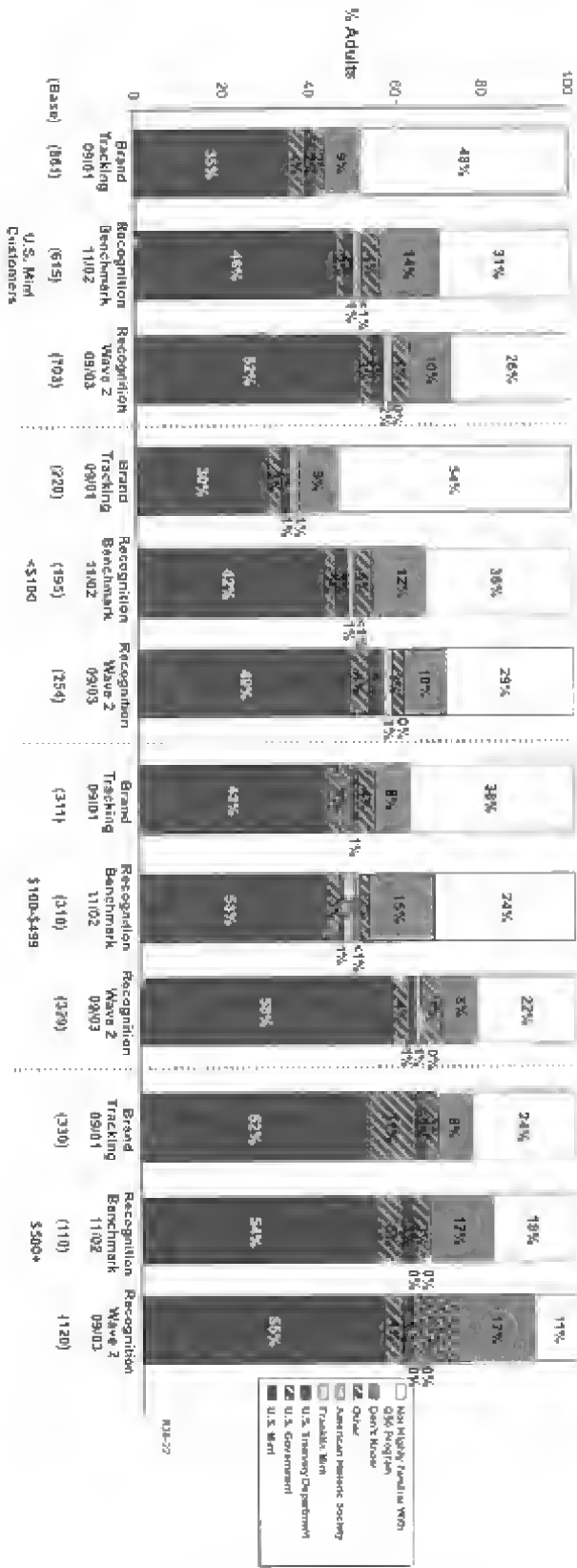


* Percentages for "Not Highly Familiar" include responses "1" through "5" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.2, Q.2a, Brand Tracking Q.55, Q.56, Q.56a

Q50 Awareness, Attitudes & Behaviors... Program Familiarity

OVER THE PAST YEAR, U.S. MINT CUSTOMERS SPENDING \$500+ HAVE SHOWN THE GREATEST INCREASE IN FAMILIARITY WITH THE Q50 PROGRAM, WHILE THOSE SPENDING < \$100 HAVE SHOWN THE GREATEST INCREASE IN ASSOCIATION OF THE PROGRAM WITH THE U.S. MINT

Table 39b
Association Of The Q50 Program With The U.S. Mint By Buyer Status

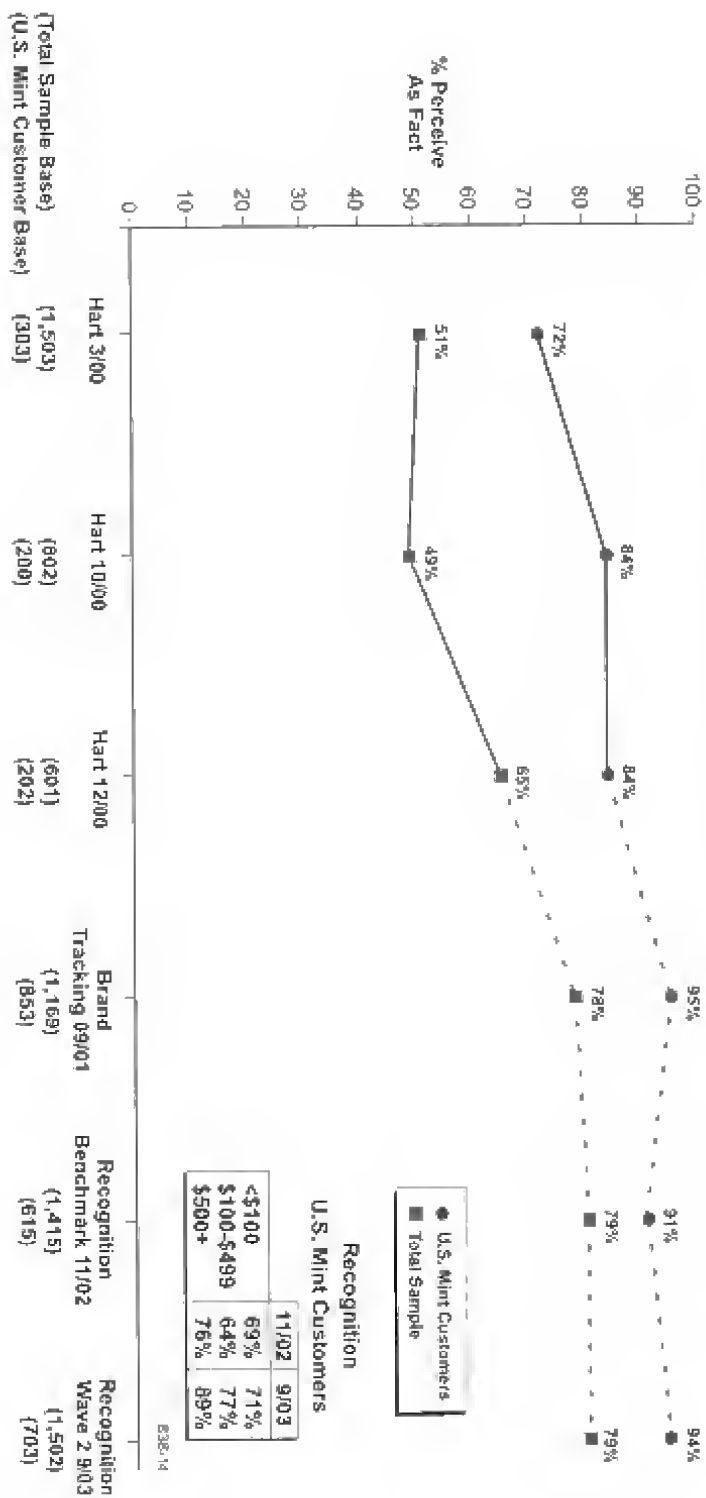


* Percentages for "Not Highly Familiar" include responses "1" through "5" on a scale from "1" to "6" where "1" means "Strongly Disagree" and "6" means "Strongly Agree."
Source: Q.2, Q.2a, Brand Tracking Q.56, Q.56, Q.56a

Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

AWARENESS THAT QUARTERS WILL BE PRODUCED IN THE ORDER IN WHICH STATES JOINED THE UNION HAS REMAINED HIGH AT NEARLY 80% FOR THE TOTAL POPULATION

Table 40
"Fact: The New Quarters Will Be Produced In the Order In Which States Joined The Union"

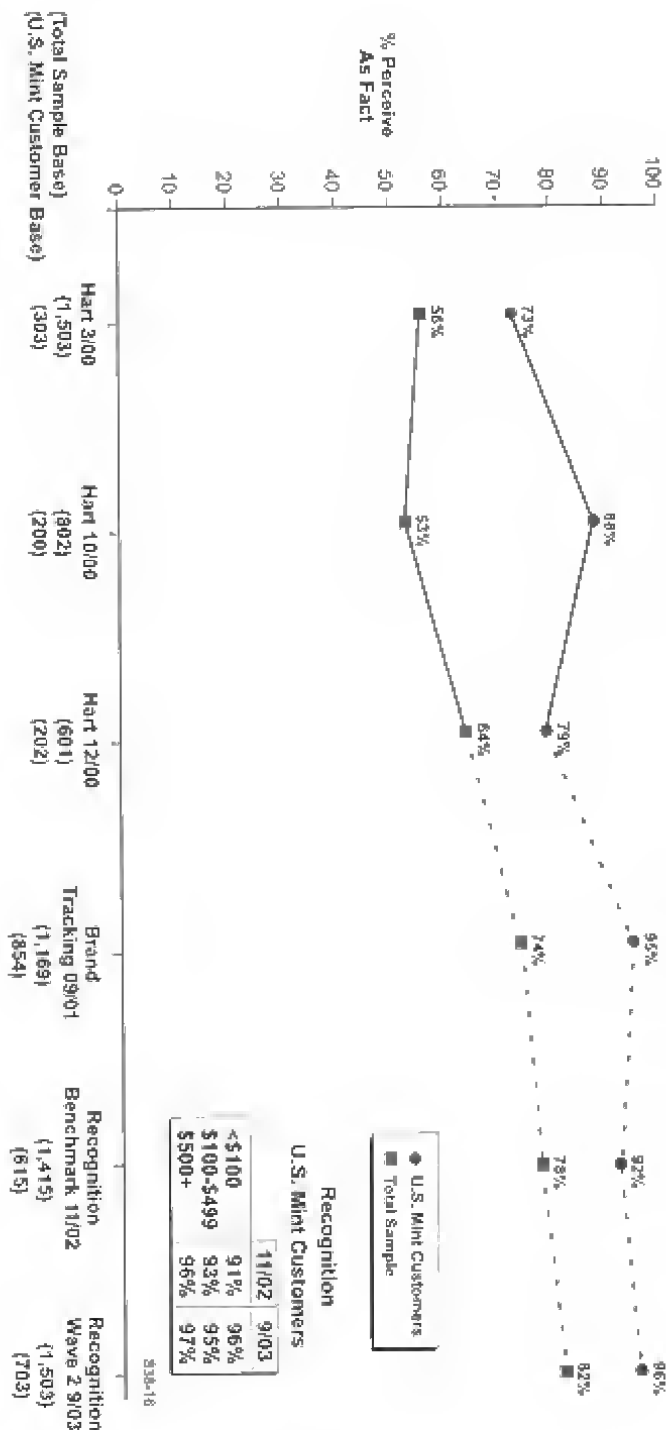


Source: Q 6; Brand Tracking Q.29a; Hart Q.4

Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

KNOWLEDGE THAT THE U.S. MINT WILL PRODUCE FIVE NEW QUARTERS A YEAR HAS ALSO NOT DIPPED SINCE LAST YEAR

Table 41
"Fact: The Mint Will Produce Five New Quarters A Year Beginning In 1999 & Ending In 2008"

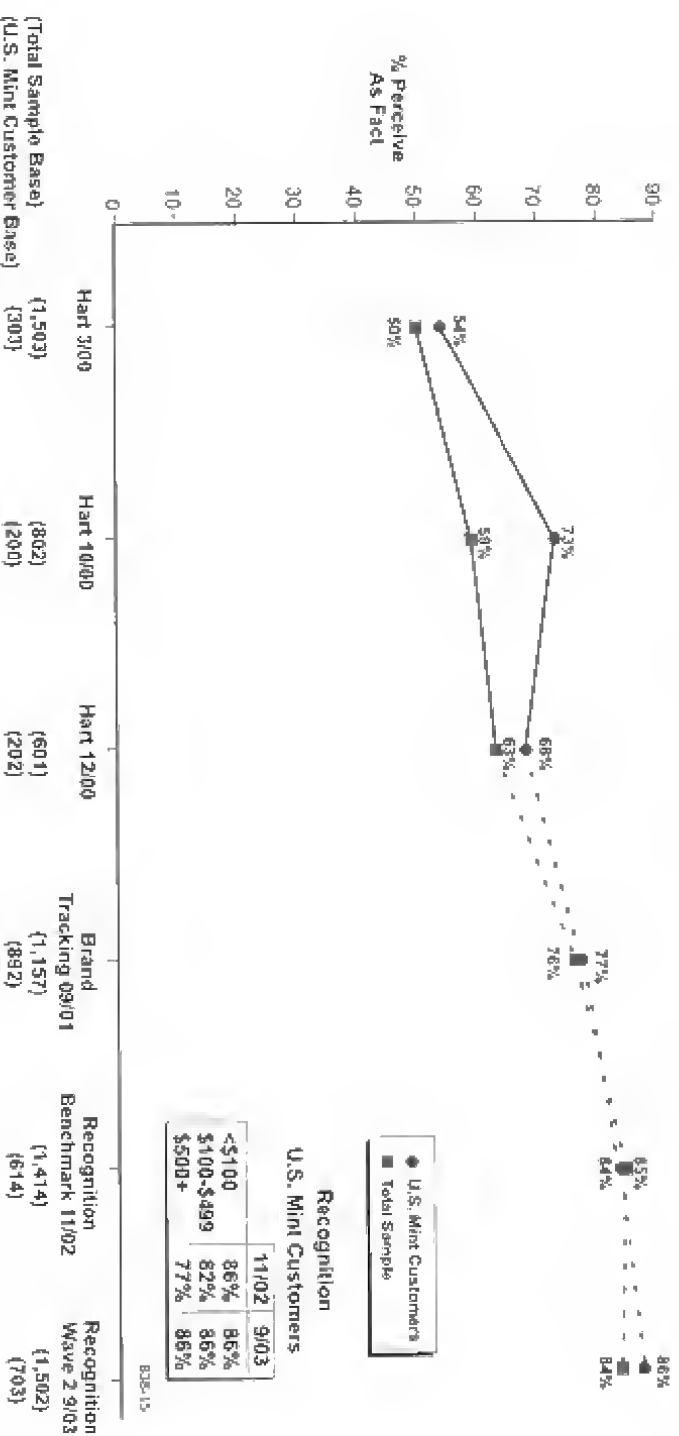


Source: Q.6; Brand Tracking Q.29a; Hart Q.4

Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

OVERALL AWARENESS THAT PRODUCTION OF EACH NEW QUARTER IS LIMITED HAS REMAINED STABLE, ALTHOUGH AMONG HIGHER SPENDING U.S. MINT CUSTOMERS AWARENESS HAS INCREASED SOMEWHAT

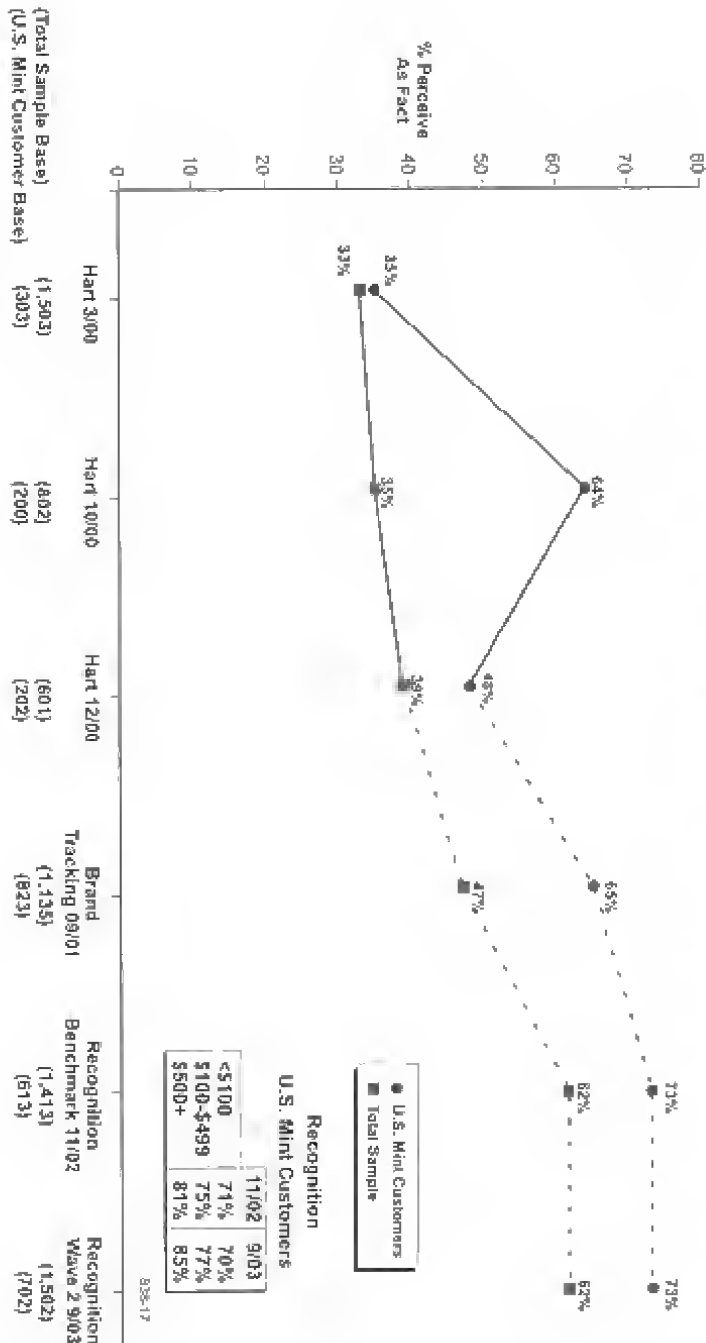
Table 42
"Fact: The Mint Will Produce A Limited Number Of Each New Quarter"



Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

AWARENESS THAT EACH QUARTER WILL BE MINTED FOR ONLY TEN WEEKS CONTINUES TO BE THE LEAST FAMILIAR ASPECT OF THE Q50 PROGRAM, SHOWING NO INCREASE IN AWARENESS OVER THE PAST YEAR

Table 43
"Fact: Each Quarter Will Be Minted For Only 10 Weeks & Then Will Never Be Minted Again"

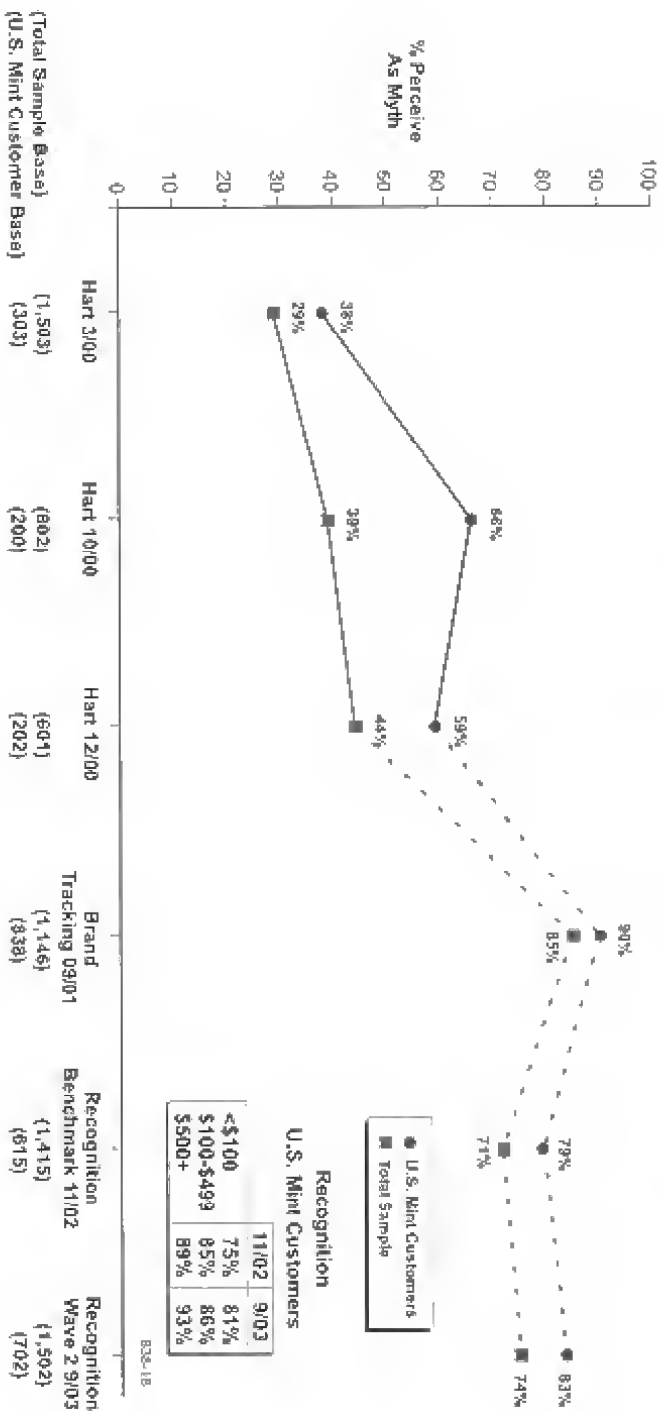


Source: Q.6; Brand Tracking Q.29a; Hart Q.4

Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

KNOWLEDGE THAT Q50 QUARTERS DO NOT HAVE A HIGHER SILVER CONTENT IS SLOWLY INCREASING, ALTHOUGH IT HAS NOT YET APPROACHED THE SEPTEMBER 2001 PEAK AWARENESS LEVELS

Table 44
"Myth: The New Quarters Will Have A Higher Silver Content Than The Old Quarters"

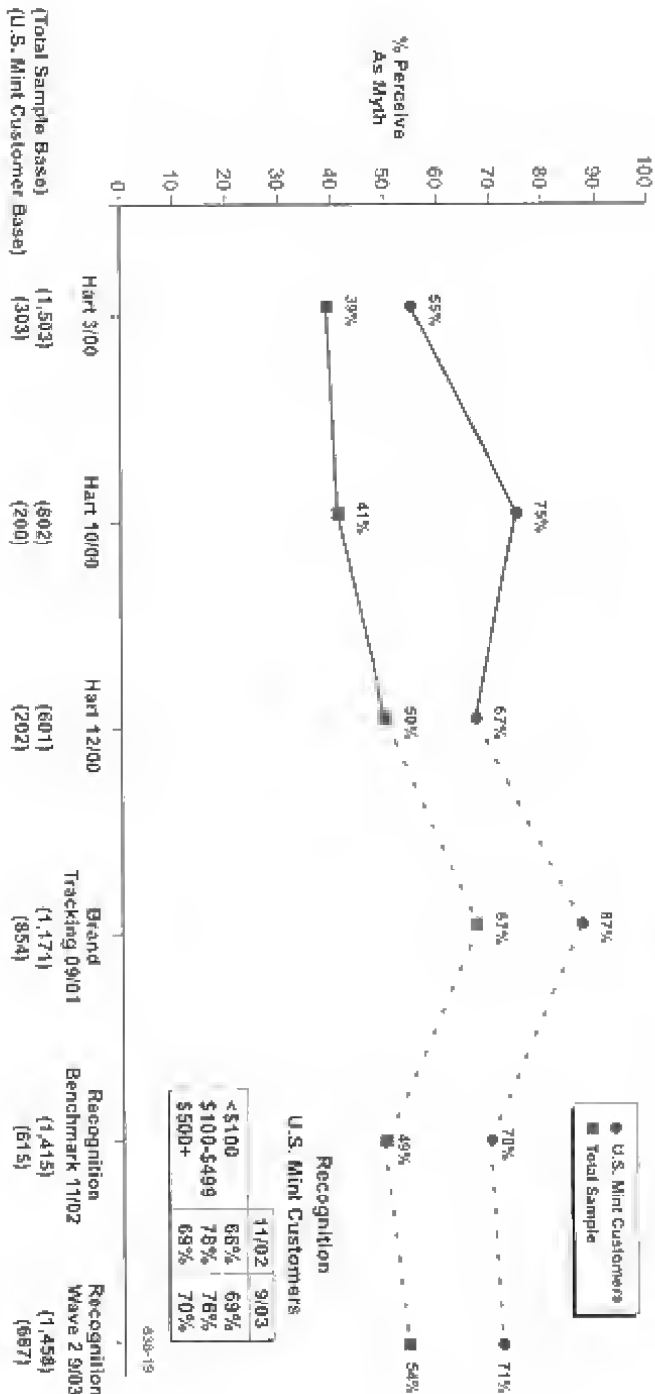


Source: Q.6; Brand Tracking Q.29a; Hart Q.4

Q50 Awareness, Attitudes & Behaviors... Awareness of Program Features

KNOWLEDGE THAT THE U.S. MINT WILL NOT PRODUCE A NEW QUARTER EVERY MONTH HAS REBOUNDED SOMEWHAT OVER THE PAST YEAR DUE TO INCREASED KNOWLEDGE AMONG NON-U.S. MINT CUSTOMERS

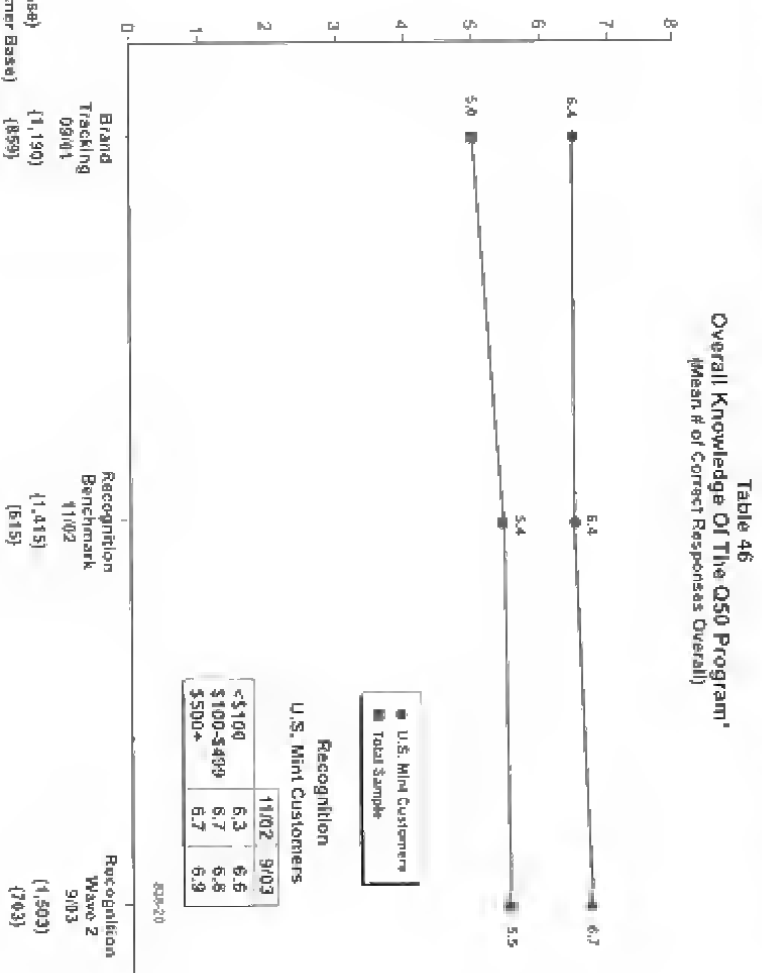
Table 45
"Myth: The Mint Will Produce A New Quarter Every Month For The Next few Years
Until A Quarter Has Been Produced For Each State"



Source: Q.6; Brand Tracking Q.29a; Hart Q.4

Q50 Awareness, Attitudes & Behaviors... In-Depth Familiarity

CONSIDERING ALL ASPECTS OF THE Q50 PROGRAM, KNOWLEDGE LEVELS HAVE REMAINED STABLE AMONG BOTH U.S. MINT CUSTOMERS AND NON-U.S. MINT CUSTOMERS SINCE THE BENCHMARK SURVEY



* Out of a possible 8 points.

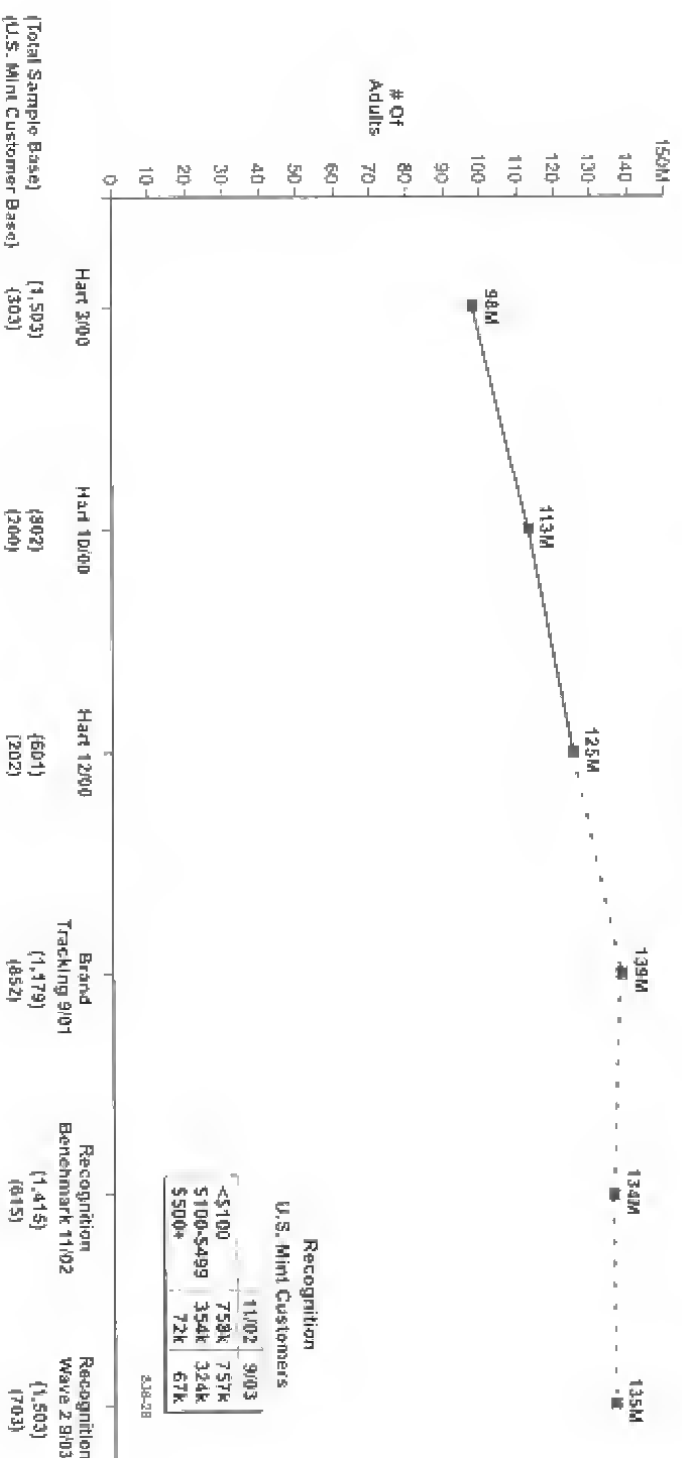
Note: Composite score is based on knowledge of the Q50 program sponsor, knowledge that the U.S. Mint sells quarters, and knowledge of the six Q50 program features.

Source: Q.2a, Q.3a, Q.6a

Q50 Awareness, Attitudes & Behaviors... Collecting Activities

THE NUMBER OF ADULTS WHO MADE AN EFFORT TO SAVE, PUT ASIDE OR COLLECT STATE QUARTERS HAS ALSO REMAINED STEADY AT 135M

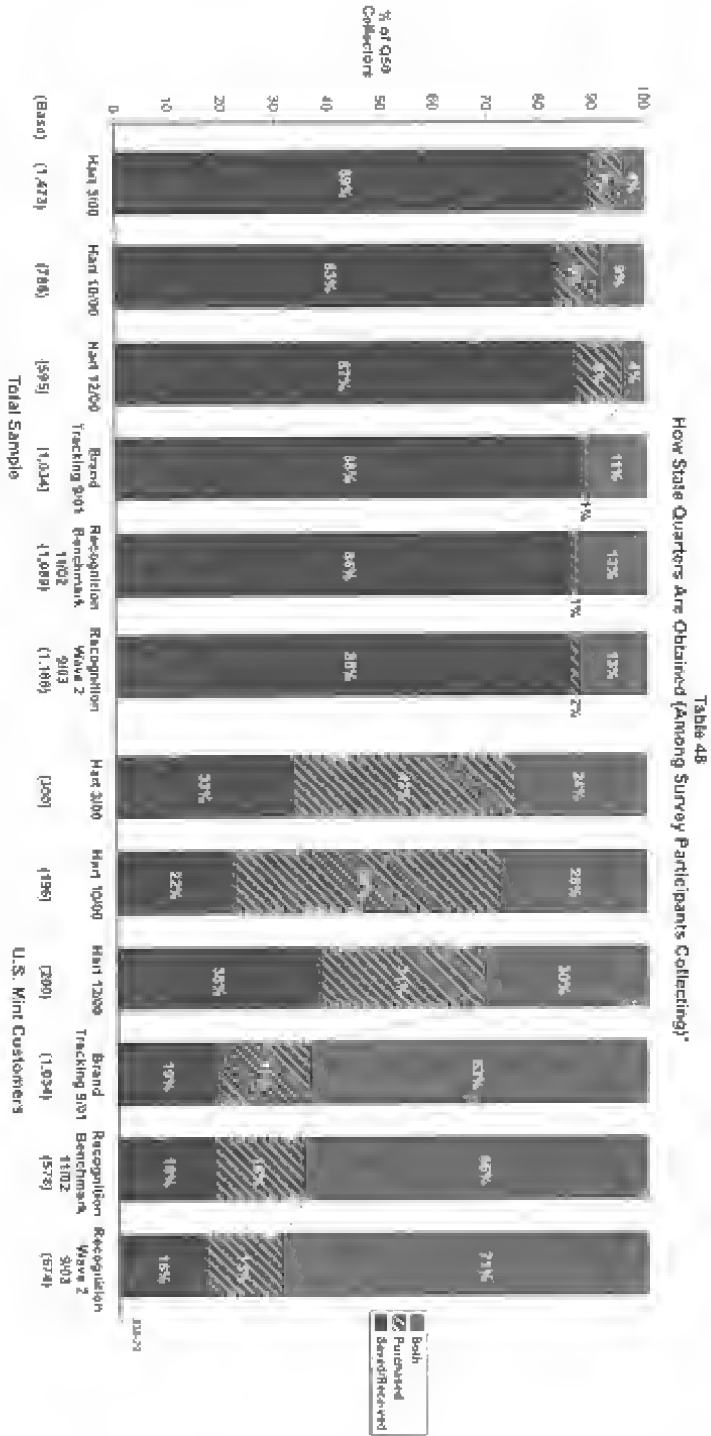
Table 47
Number Of Adults Who Made Personal Effort To Save, Put Aside, Or Collect State Quarters



Q50 Awareness, Attitudes & Behaviors... Collecting Activities

PROPORTIONATELY MORE U.S. MINT CUSTOMERS ARE ACTIVELY ENGAGED IN BOTH SAVING AND PURCHASING STATE QUARTERS THIS YEAR COMPARED WITH PRIOR YEARS

- State quarter collecting behavior has not changed much among Non-U.S. Mint Customers

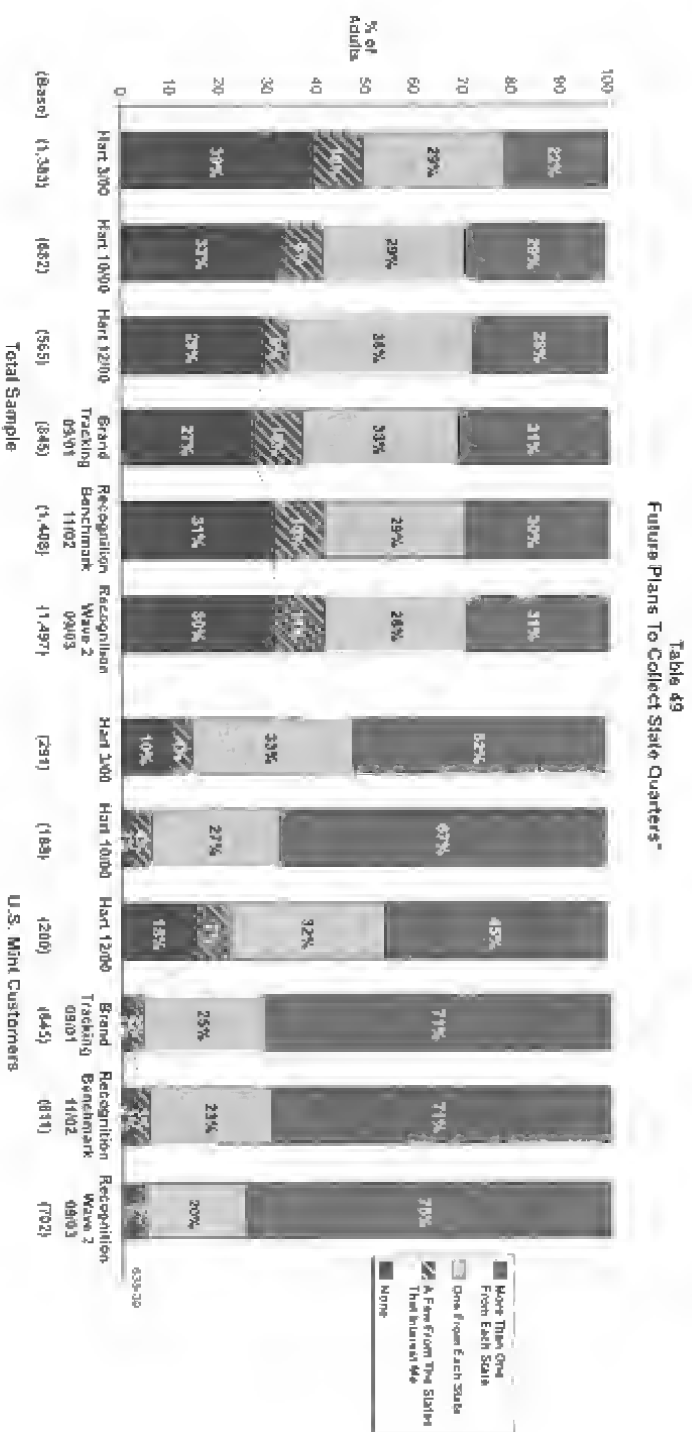


* May not sum to 100% due to rounding.
Source: Q.9; Brand Tracking Q.29d; Hart Q.7

Q50 Awareness, Attitudes & Behaviors... Collecting Activities

COMPARED TO THE BENCHMARK SURVEY, SLIGHTLY MORE U.S. MINT CUSTOMERS PLAN TO COLLECT MORE THAN ONE QUARTER FROM EACH STATE IN THE FUTURE

- No changes in future Q50 collecting are noted among Non-U.S. Mint customers



Conclusions & Recommendations...

THESE RESULTS DEMONSTRATE THAT U.S. MINT ADVERTISING PLAYS AN IMPORTANT ROLE IN REDUCING BRAND CONFUSION AND DILUTION, AND, AT THE SAME TIME, SERVING AS A STIMULUS FOR MAKING PURCHASES

- First, recall of advertising, particularly on the Internet and in newspapers as well as on Cable TV, has increased somewhat since the Benchmark Survey
- Second, such advertising appears to have prompted U.S. Mint customers to make U.S. Mint purchases
 - As many as 40% claim to have made a purchase after having heard or seen advertising
 - Those at all spend levels were equally prompted to do so, suggesting that the ads are appealing to all types of collectors
- Third, familiarity and knowledge with the U.S. Mint increased, while associations with the Franklin Mint decreased – particularly among lower spending U.S. Mint customers
 - Identification of U.S. Mint products increased among <\$100 buyers
 - Perhaps an indication that such customers are better able to make distinctions among different "Mint" offerings
- Fourth, certain U.S. Mint customer segments (especially <\$100 buyers) are expressing more interest in buying proof and uncirculated coins in the future as well as spending more money with the U.S. Mint next year

Conclusions & Recommendations...

FURTHERMORE, THERE APPEARS TO BE MORE RECOGNITION THAT U.S. MINT PRODUCTS MAKE GOOD GIFTS AND GREATER USE OF THE U.S. MINT WEBSITE THAN IN THE PAST

- The results clearly show an increase in the percentage of individuals – both U.S. Mint and non-U.S. Mint customers – who perceive that U.S. Mint coins make good gifts
 - Giving such items as gifts increased among all customer spending levels
 - The largest increase is observed for those who spend <\$100 annually
- While U.S. Mint coins make good gifts in general, giving them as gifts for the holidays also increased – again demonstrating that the advertising themes are being both recalled and internalized
 - Recognition that U.S. Mint coins are good holiday gifts increased the most among both low and moderate spenders
 - Both groups appear to be developing an interest in and affinity for U.S. Mint coins
- Additionally, while many of those inspired to make purchases as a result of seeing or hearing ads did so via the U.S. Mint website, general use of the website increased
 - Both U.S. Mint and Non-U.S. Mint customers report greater usage of the website
 - Access to information (especially product-related) – perhaps stimulated by the ads – was being sought

Conclusions & Recommendations...

THEREFORE, IT WOULD BE WISE FOR THE U.S. MINT TO CONTINUE ITS "GENUINE U.S. MINT" ADVERTISING CAMPAIGN AS IT APPEARS TO CREATE BOTH GREATER INTEREST IN AND PURCHASE OF U.S. MINT COINS

- While it is still too early to tell if the Genuine U.S. Mint campaign will have lasting effects, the early indications are that it is having a noticeable impact on U.S. Mint brand recognition and value
 - Greater awareness and "accurate" knowledge
 - Increased saving and purchase of coins (including, but not only, 50 state quarters items)
 - Less confusion about the U.S. Mint and other mints
- Recognition of the value of coins – from a "Collect America" to a sharing from generation to generation – is beginning to be observed
 - Additional advertising will serve as a reinforcement
 - Moreover, it could serve as a springboard for promoting more interest in American history (e.g., Lewis and Clark, etc.)
- Because the campaign appears to be hitting its intended target – lower spend customers who are relatively new to purchasing coins – it would be worthwhile to continue to remind them of the value of collecting and making purchases
- As 2004's campaign is being developed it may be beneficial to determine what additional themes and/or messages would be most appealing (e.g., more history related or gift themes, etc.) to ensure continued affinity is developed among newer and lower spend customers

Glossary

- ***Non-Mint Customers:*** Adults who have not purchased coins from the U.S. Mint within the past year (includes those who collect coins from other sources, those who do not collect coins, purchased coins from the U.S. Mint but not in the past year)
- ***U.S. Mint Customers:*** Adults who have purchased coins from the U.S. Mint within the past year
 - < \$100 ...and spent between \$1 and \$99
 - \$100 – \$499 ...and spent between \$100 and \$499
 - \$500 + ...and spent \$500 or more
- ***Total U.S. Coin Collectors:*** Adults who collect coins
- ***Non-Mint U.S. Coin Collectors:*** Adults who collect U.S. coins but have not purchased coins from the U.S. Mint within the past year

APPENDIX

- Recognition Benchmark Demographics
- Questionnaire

Appendix... Recognition Benchmark (11/02)

Demographics by Customer Status									
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)	
			<\$100 (%)	\$100 - \$499 (%)	\$500+ (%)				
Gender									
Male	38	59	51	70	89	38	47	38	
Female	62	41	49	30	11	62	53	62	
Age*									
18-34	32	14	17	8	3	32	22	26	
35-54	44	34	34	34	33	44	54	47	
55 or over	23	53	49	59	64	23	24	27	
Presence of Children**									
Have children under 18 years	40	22	25	18	15	40	39	40	
Have children newborn to three years of age	39	32	35	24	31	39	39	40	
Have children preschool or kindergarten age	27	25	30	13	16	27	18	29	
Have children in grade school	49	59	63	48	57	49	57	54	
Have children in high school	34	34	29	45	42	34	31	35	
Presence of Grandchildren**									
Have grandchildren	30	46	44	49	50	30	32	37	
Have grandchildren newborn to three years of age	62	43	41	46	47	62	64	63	
Have grandchildren preschool or kindergarten age	42	41	39	42	57	42	39	46	
Have grandchildren in grade school	54	61	62	59	62	54	41	66	
Have grandchildren in high school	29	40	40	42	38	29	24	34	
(Approximate Base)									
	(1,415)	(615)	(185)	(310)	(110)	(800)	(669)	(336)	

* May not sum to 100% due to rounding.

** Does not sum to 100% due to multiple responses

Source: Q35, Q.37, Q.38, Q.39, Q.40, Q.45

Appendix... Recognition Benchmark (11/02)

Demographics by Customer Status									
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)	
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)				
Education*									
High School or less	28	25	26	22	21	28	26	32	
Some College	24	26	25	28	30	24	31	24	
College Graduate	32	28	25	34	30	32	32	30	
Post Graduate Degree	16	21	24	16	20	16	11	14	
Total Household Income*									
Less than \$20,000	22	14	15	13	6	22	9	20	
\$20,000 to \$49,999	45	36	36	37	36	45	48	49	
\$50,000 to \$74,999	15	24	24	23	23	15	20	16	
\$75,000 or more	18	26	24	27	36	18	22	15	
Employment Status*									
Full-time	56	41	42	39	38	57	56	55	
Part-time	12	10	12	6	3	12	10	11	
Retired	15	39	34	48	52	15	20	18	
Not Employed or Student	16	9	11	7	7	16	13	16	
(Approximate Base)	(1,415)	(615)	(195)	(310)	(110)	(800)	(632)	(327)	

* May not sum to 100% due to rounding.
Source: Q.36, Q.41, Q.42

Appendix... Recognition Benchmark (11/02)

% Reading Magazines a Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
News	30	33	32	37	28	30	40	28
Educational, Science or Nature	15	20	20	19	20	15	19	15
Sports	13	15	14	15	18	13	18	16
Home & Garden	13	11	13	8	6	13	15	13
Business or Personal Finance	10	12	10	16	23	10	9	11
Entertainment	10	7	7	7	5	10	12	8
Family or Parenting	9	5	6	4	1	9	7	9
Fashion	9	3	4	1	3	9	11	8
Hobbies or Collecting	9	13	10	17	31	9	7	11
Popular Culture	6	2	1	3	1	6	10	4
Automotive	4	6	5	8	8	4	5	5
% Reading Magazines a Little/Not Regularly	30	29	31	26	24	30	30	29
(Approximate Base)	(1,413)	(614)	(195)	(310)	(109)	(799)	(673)	(341)

* Does not sum to 100% due to multiple responses.
Source: Q.27

Appendix... Recognition Benchmark (11/02)

Newspaper Readership by Customer Status*								
% Reading Newspapers on a Regular Basis	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
Town, county or other local weekly	64	61	60	65	59	64	58	67
State, regional, metropolitan weekend	61	71	72	69	78	60	65	59
State, regional, metropolitan daily	56	62	63	57	70	56	66	56
National	27	33	37	27	31	26	37	26
Business	17	19	17	20	30	17	23	17
% Not Reading Newspapers Regularly	11	8	7	9	7	11	10	8
(Approximate Base)	(1,412)	(613)	(195)	(310)	(108)	(799)	(672)	(341)

* Does not sum to 100% due to multiple responses.
Source: Q.28

Appendix... Recognition Benchmark (11/02)

Network Television Viewership by Customer Status*								
% Watch Network Television Programs a Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
News	63	75	78	71	72	63	75	67
Movies	50	41	43	39	28	50	48	52
Educational/Documentaries	46	49	47	50	65	46	54	48
Sports	31	35	34	35	48	31	37	33
Dramatic Series	27	22	23	20	20	27	28	32
Sitcoms	25	16	18	12	15	25	33	24
Game Shows	10	12	12	10	9	10	12	12
Talk Shows	14	10	9	12	14	14	18	15
% Watch Network Television a Little/Not at all	9	8	7	11	6	9	7	8
(Approximate Base)	(1,413)	(614)	(195)	(310)	(109)	(799)	(673)	(341)

* Does not sum to 100% due to multiple responses.
Source: Q.22

Appendix... Recognition Benchmark (11/02)

Cable Access & Frequency of Viewing by Customer Status								
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
Cable Access								
% with access	78	83	84	80	82	78	80	77
(Base)	(1,413)	(614)	(195)	(310)	(109)	(799)	(673)	(341)
Channels Watched*								
% watch at least one a lot	81	81	81	80	81	81	89	82
% watch moderately	18	17	17	19	16	18	11	18
% watch none at all	1	2	3	1	3	1	<1	<1
(Base)	(1,125)	(504)	(164)	(249)	(91)	(621)	(551)	(264)

* Channels include Discovery, TNT, TBS, History Channel, Lifetime, Fox Family, A&E, Home & Garden, and the Food Network.
Source: Q.23, Q.24

Appendix... Recognition Benchmark (11/02)

Cable Television Viewership by Customer Status*
(Among those with Cable TV Access)

% Watching Cable Television Channels A Lot	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100- \$499 (%)	\$500+ (%)			
Discovery	49	50	50	49	59	49	57	54
TNT, TBS or other general entertainment	42	35	35	36	35	42	42	49
The History Channel	34	43	40	46	53	34	35	38
The Learning Channel	31	27	26	29	26	31	42	33
Lifetime	31	20	21	20	13	31	35	35
Fox Family Channel	28	23	25	20	21	28	34	35
A & E	25	32	32	33	29	25	38	27
Home and Garden	15	16	17	11	15	15	17	16
The Food Network	12	13	13	13	13	12	23	11
(Approximate Base)	(1,122)	(503)	(164)	(248)	(91)	(620)	(549)	(263)

* Does not sum to 100% due to multiple responses.
Source: Q.24

Appendix... Recognition Benchmark (11/02)

Times of Day & Week Radio Listened To by Customer Status								
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
Time of Week Listen to the Radio*								
Weekdays	25	23	25	20	19	25	28	26
Weekends	5	2	2	2	5	5	5	4
Both	54	48	47	48	51	54	55	56
Neither	17	27	25	30	25	16	11	15
(Approximate Base)	(1,409)	(611)	(194)	(308)	(109)	(798)	(670)	(341)
Time of Day Listen to the Radio**								
Early morning	81	76	75	77	78	81	81	80
Late morning or afternoon	67	62	62	62	67	67	60	73
Early evening	54	53	56	47	42	54	59	55
Late evening	36	30	30	30	24	36	34	37
(Approximate Base)	(1,113)	(457)	(149)	(223)	(86)	(656)	(509)	(285)

* May not sum to 100% due to rounding.

** Does not sum to 100% due to multiple responses.

Source: Q.30

Appendix...Recognition Benchmark (11/02)

Internet Access & Frequency of Key Site Usage by Customer Status								
	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
Internet Access								
% with access	70	69	69	69	67	70	76	69
(Base)	(1,414)	(614)	(195)	(310)	(109)	(800)	(673)	(341)
Key Site Internet Usage*								
% use at least one a lot	58	66	65	67	76	58	56	58
% use moderately	36	31	33	28	20	36	35	36
% use none at all	6	3	2	5	4	6	9	6
(Base)	(990)	(427)	(136)	(218)	(73)	(563)	(472)	(234)

* Sites include Yahoo, new sites like CNN, eBay, Amazon.com, and retail store, financial and government sites.

Source: Q.29, Q.30

Appendix... Recognition Benchmark (11/02)

Key Site Internet Usage by Customer Status*
(Among those with Internet Access)

Internet Sites	Total Sample (%)	Total U.S. Mint Customers (%)	U.S. Mint Customers			Non-Mint Customers (%)	U.S. Coin Purchasers (%)	U.S. Coin Savers (%)
			<\$100 (%)	\$100-\$499 (%)	\$500+ (%)			
Yahoo	33	28	30	26	25	33	29	33
News sites like CNN	19	22	22	21	21	19	24	17
eBay	14	17	14	20	29	14	22	14
Websites of retail stores	13	10	11	10	11	13	13	14
Financial sites	10	16	14	16	36	9	16	9
Government websites	9	11	7	17	24	9	11	12
Amazon.com	8	8	7	7	11	8	11	10
(Approximate Base)	(989)	(427)	(136)	(218)	(73)	(562)	(472)	(234)

* Does not sum to 100% due to multiple responses.
Source: Q.30

ALL INSTRUCTIONS TO INTERVIEWERS AND PROGRAMMERS ARE ENCLOSED IN
 BRACKETS AND PRINTED IN CAPITALIZED, BOLD TEXT. INSTRUCTIONS TO
 PROGRAMMERS ARE ALSO MARKED IN RED FONT.

INTRODUCTION FOR NEW CUSTOMER SAMPLE Hello, I'm _____ calling from National Analysts, a research and consulting firm. We are conducting a research study on behalf of the United States Mint about people's collecting interests and behaviors. If you qualify and complete the 25-minute interview you will receive \$10. This is a research survey only. We have nothing to sell. Your participation is strictly voluntary.

INTRODUCTION FOR OLD CUSTOMER SAMPLE Hello, I'm _____ calling from National Analysts, a research and consulting firm. About six to eight months ago you participated in a survey sponsored by the United States Mint on people's collecting interests and behaviors. We are now conducting the follow-up interview which you agreed to in the earlier survey. This interview should take 20 to 25 minutes and you will receive \$10 if you complete it. This is a research survey only. We have nothing to sell. Your participation is strictly voluntary.

INTRODUCTION FOR NEW RDP SAMPLE Hello, I'm _____ calling from National Analysts, a research and consulting firm. We are conducting a research study about people's collecting interests and behaviors. If you qualify and complete the 25-minute interview you will receive \$10. This is a research survey only. We have nothing to sell. Your participation is strictly voluntary.

INTRODUCTION FOR OLD RDP SAMPLE Hello, I'm _____ calling from National Analysts, a research and consulting firm. About six to eight months ago you participated in a survey on people's collecting interests and behaviors. We are now conducting the follow-up interview which you agreed to in the earlier survey. This interview should take 20 to 25 minutes and you will receive \$10 if you complete it. This is a research survey only. We have nothing to sell. Your participation is strictly voluntary.

S1. I'd like to ask you just a few questions to see if you qualify for our survey. First, are you 18 years of age or older?

Yes	1
No	2

IF S1 IS "NO" AND SAMPLE IS NEW CUSTOMER, OLD CUSTOMER, OR OLD RDP, THEN
 TERMINATE;
 IF S1 IS "NO" AND SAMPLE IS NEW RDP, THEN ASK FOR SOMEONE IN HOUSEHOLD WHO
 IS 18 YEARS OF AGE OR OLDER]

S2. [RANDOMIZE 1ST ITEMS] Which of the following items do you currently collect, buy, save, or put aside? Please answer "Yes" or "No" to each item.

Collectible		
	Yes	No
a. U.S. coins?	1	2
b. Coins from countries outside the United States?	1	2
c. Stamps?	1	2
d. Other things?	1	2

IF RECRUIT IS FROM NEW U.S. MINT CUSTOMER FILE AND LEVEL "A" IS NO, THEN

TERMINATE;

IF RECRUIT IS FROM OLD RDD FILE OR OLD U.S. MINT CUSTOMER FILE AND LEVEL "A" IS

"NO" THEN QUOTA = OLD GENERAL PUBLIC;

IF RECRUIT IS FROM NEW RDD FILE AND LEVEL "A" IS "NO" THEN QUOTA = NEW GENERAL

PUBLIC;

[ASK S3 IF LEVEL "A" IS "YES" IN S2, ELSE SKIP TO Q1]

S3. [RANDOMIZE SEQUENCE OF FIRST TWO LEVELS, AND THEN KEEP THAT ORDER IN

SPECIFIED QUESTIONS] [RANDOMLY SELECT A THIRD ORGANIZATION TO ASK

ABOUT AND KEEP THAT ORGANIZATION THROUGHOUT SPECIFIC QUESTIONS] Have

you purchased any coins or coin-related products from [READ 1st ITEM] during the past 12

months? What about from [READ 2nd ITEM] during the past 12 months? What about from

[READ 3rd ITEM] during the past 12 months? [SELECT ONE FOR EACH ROW]

Organization		
	Yes	No
a. The United States Mint?	1	2
b. The Franklin Mint?	1	2
c. Regional or Local Coin Dealers?	1	2
d. Home Shopping Network, QVC, or other TV shopping programs?	1	2
e. Unicover Corporation?	1	2
f. The American Historic Society?	1	2
g. eBay or other Internet Auction sites?	1	2
h. Companies offering coins in direct mail/newspaper/magazine ads?	1	2

IF RECRUIT IS FROM NEW U.S. MINT CUSTOMER FILE AND "YES" IS NOT SELECTED FOR

LEVEL "A", THEN TERMINATE.

IF RECRUIT IS FROM OLD RDD FILE OR OLD U.S. MINT CUSTOMER FILE AND S2 LEVEL "A"

IS "YES" AND S3 LEVEL "A" IS "NO" THEN QUOTA = OLD COIN COLLECTORS;

IF RECRUIT IS FROM OLD RDD FILE AND S3 LEVEL "A" IS "YES" THEN CONTINUE;

IF RECRUIT IS FROM NEW RDD FILE AND S2 LEVEL "A" IS "YES" AND S3 LEVEL "A" IS "NO"

THEN QUOTA = NEW COIN COLLECTORS;

IF RECRUIT IS FROM NEW RDD FILE AND S3 LEVEL "A" IS "YES" THEN CONTINUE]

United States Mint
Post-Assessment Survey for "Genuine United States Mint" Advertising Program
August 2003

S4a. [IF S3 LEVEL "A" = "YES" THEN ASK] Please consider how much you spent on United States Mint coins and coin-related products in the last 12 months. Was it...? [READ LIST] [SELECT ONE]

Level of Spending at U.S. Mint	
<\$100	1
\$100 - \$499	2
\$500 or more	3

[IF RECUT IS FROM OLD U.S. MINT CUSTOMER FILE OR OLD RPD FILE AND S4a IS CODE "1" THEN QUOTA = OLD U.S. MINT CUSTOMER <\$100;
IF RECUT IS FROM OLD U.S. MINT CUSTOMER FILE OR OLD RPD FILE AND S4a IS CODE "2" THEN QUOTA = OLD U.S. MINT CUSTOMER \$100 - \$499;
IF RECUT IS FROM OLD U.S. MINT CUSTOMER FILE OR OLD RPD FILE AND S4a IS CODE "3" THEN QUOTA = OLD U.S. MINT CUSTOMER \$500 OR MORE;
IF RECUT IS FROM NEW U.S. MINT CUSTOMER FILE OR NEW RPD FILE AND S4a IS CODE "1" THEN QUOTA = NEW U.S. MINT CUSTOMER <\$100;
IF RECUT IS FROM NEW U.S. MINT CUSTOMER FILE OR NEW RPD FILE AND S4a IS CODE "2" THEN QUOTA = NEW U.S. MINT CUSTOMER \$100 - \$499;
IF RECUT IS FROM NEW U.S. MINT CUSTOMER FILE OR NEW RPD FILE AND S4a IS CODE "3" THEN QUOTA = NEW U.S. MINT CUSTOMER \$500 OR MORE]

S4b. [IF S3 LEVEL "A" = "YES" THEN ASK] When was the very first time you ever purchased coins or coin-related products from the U.S. Mint? [READ LIST] [SELECT ONE]

First Time Purchased from U.S. Mint	
Within the past 12 months	1
13 months to 2 years ago	2
More than 2 years ago	3

[IF RECUT IS FROM OLD OR NEW U.S. MINT CUSTOMER FILE AND S4b IS CODE "1" THEN QUOTA = U.S. MINT FIRST-TIME CUSTOMER;
IF S4b IS CODE "2" OR "3" THEN QUOTA = U.S. MINT REPEAT CUSTOMER]

S5. [RANDOMIZE ITEMS] Which of the following best describes what prompted you to purchase coins or coin-related products in the last 12 months? [READ LIST] [SELECT ONE]

Reason for purchasing	
Someone suggested it to me,	1
I thought of it on my own, or	2
I read, heard, or saw advertising?	3

Recognition of U.S. Mint & Mint Products

1. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3; ORDER LEVELS AS IN S3] I will read the names of three organizations that produce and/or sell coins. Please indicate how familiar you are with each organization, including its reputation and the coin products it sells or produces by choosing a number between "1" and "6," where "1" means "Not at all familiar" and "6" means "Very familiar." [INSERT A NUMBER BETWEEN 1 AND 6]

Organization		Rating
a.	The United States Mint	
b.	The Franklin Mint	
c.	Regional or Local Coin Dealers	
d.	Home Shopping Network, QVC, or other TV shopping programs	
e.	Unicover Corporation	
f.	The American Historic Society	
g.	eBay or other Internet Auction sites	
h.	Companies offering coins in direct mail/newspaper/magazine ads	

2. How much, if anything, have you heard or read about the 50 State Quarters™ program? Choose a number from "1" to "6," where "1" means you have read or heard "Nothing at all" about the 50 State Quarters™ program, and "6" means you have read or heard "A great deal" about the program. [INSERT A NUMBER BETWEEN 1 AND 6]

50 State Quarters™ program		Rating

- 2a. To the best of your knowledge, what organization or group is responsible for the 50 State Quarters™ program? [DO NOT READ] [SELECT ONE]

	Responsible for 50 State Quarters™ Program
1	The Franklin Mint
2	The United States Mint
3	Unicover Corporation
4	The American Historic Society
5	The United States Government
6	The United States Treasury Department
9	Don't Know
0	Other (Specify)

3a. [ASK Q3A THEN Q3B IF U.S. MINT WAS ASKED FIRST IN Q1; ASK Q3B THEN Q3A IF U.S. MINT WAS ASKED SECOND IN Q1; RANDOMIZE LIST AND MAINTAIN THAT SAME ORDER THROUGHOUT Q3 SERIES] Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by the United States Mint. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		
Offered by US Mint?		
	Yes	No
a. Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b. Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and the West Point Bicentennial	1	2
c. Quarters from the U.S. Mint 50 State Quarters Program	1	2
d. Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e. Antique U.S. coins	1	2
f. Painted or colorized U.S. coins	1	2
g. Official foreign coins	1	2
h. Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i. Coin jewelry and other coin-related gift items	1	2

3b. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by the Franklin Mint. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		
Offered by Franklin Mint?		
	Yes	No
a. Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b. Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c. Quarters from the U.S. Mint 50 State Quarters Program	1	2
d. Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e. Antique U.S. coins	1	2
f. Painted or colorized U.S. coins	1	2
g. Official foreign coins	1	2
h. Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i. Coin jewelry and other coin-related gift items	1	2

[FOR Q3C - Q3H: ASK FOR THIRD ORGANIZATION SELECTED IN Q1, SKIP ALL OTHER ORGANIZATIONS]

3c. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by Regional or Local Coin Dealers. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Offered by Regional or Local Coin Dealers?	
		Yes	No
a.	Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b.	Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c.	Quarters from the U.S. Mint 50 State Quarters Program	1	2
d.	Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e.	Antique U.S. coins	1	2
f.	Painted or colorized U.S. coins	1	2
g.	Official foreign coins	1	2
h.	Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i.	Coin jewelry and other coin-related gift items	1	2

3d. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by Home Shopping Network, QVC, or other TV shopping programs. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Offered by TV shopping programs?	
		Yes	No
a.	Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b.	Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c.	Quarters from the U.S. Mint 50 State Quarters Program	1	2
d.	Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e.	Antique U.S. coins	1	2
f.	Painted or colorized U.S. coins	1	2
g.	Official foreign coins	1	2
h.	Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i.	Coin jewelry and other coin-related gift items	1	2

3e. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by Unicolor. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Yes	No
a.	Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b.	Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c.	Quarters from the U.S. Mint 50 State Quarters Program	1	2
d.	Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e.	Antique U.S. coins	1	2
f.	Painted or colorized U.S. coins	1	2
g.	Official foreign coins	1	2
h.	Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i.	Coin jewelry and other coin-related gift items	1	2
Offered by Unicolor?			

3f. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by the American Historic Society. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Offered by American Historic Society?	Yes	No
a.	Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1		2
b.	Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1		2
c.	Quarters from the U.S. Mint 50 State Quarters Program	1		2
d.	Other U.S. coins, such as the American Eagle and Golden Dollar	1		2
e.	Antique U.S. coins	1		2
f.	Painted or colorized U.S. coins	1		2
g.	Official foreign coins	1		2
h.	Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1		2
i.	Coin jewelry and other coin-related gift items	1		2

United States Mint
Post-Assessment Survey for "Genuine United States Mint" Advertising Program
August 2003

3g. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by ebay or other Internet auction sites. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Offered by ebay or other Internet auction sites?
a. Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b. Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c. Quarters from the U.S. Mint 50 State Quarters Program	1	2
d. Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e. Antique U.S. coins	1	2
f. Painted or colorized U.S. coins	1	2
g. Official foreign coins	1	2
h. Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i. Coin jewelry and other coin-related gift items	1	2

3h. Please indicate whether or not, to the best of your knowledge, each of the following coin or coin-related products is offered by companies offering coins in direct mail/ newspaper/ magazine ads. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product		Offered by companies offering coins in direct mail/newspaper/ magazine ad?
a. Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b. Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and West Point Bicentennial	1	2
c. Quarters from the U.S. Mint 50 State Quarters Program	1	2
d. Other U.S. coins, such as the American Eagle and Golden Dollar	1	2
e. Antique U.S. coins	1	2
f. Painted or colorized U.S. coins	1	2
g. Official foreign coins	1	2
h. Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
i. Coin jewelry and other coin-related gift items	1	2

4. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3] [ORDER LEVELS AS IN S3] To the best of your knowledge, which of the following organizations produce U.S. coins for circulation as currency? [READ LIST] [SELECT ONE FOR EACH ROW]

Produce Coins for Circulation		
a. The United States Mint	1	2
b. The Franklin Mint	1	2
c. Regional or Local Coin Dealers	1	2
d. Home Shopping Network, QVC, or other TV shopping programs	1	2
e. Unicover Corporation	1	2
f. The American Historic Society	1	2
g. eBay or other Internet auction sites	1	2
h. Companies offering coins in direct mail/newspaper/magazine ads	1	2

5. [RANDOMIZE LEVELS] I will next read a series of statements about some types of coins that people might collect. For each statement, please respond "TRUE" if, to the best of your knowledge, it accurately describes the type of coin or "FALSE" if it does not accurately describe the type of coin. [READ LIST] [SELECT ONE FOR EACH ROW]

Statement		
a. U.S. Mint silver proof set coins actually contain the same amount of silver as coins that are put in circulation.	1	2
b. Commemorative coins produced by the U.S. Mint are legal currency.	1	2
c. The quality of the markings or images on U.S. Mint proof sets is the same as that found on coins that are put in circulation.	1	2
d. Commemorative coins produced by the Franklin Mint are legal currency.	1	2

United States Mint
Post-Assessment Survey for "Genuine United States Mint" Advertising Program
August 2003

6. [RANDOMIZE LEVELS] I will next read a series of statements about the 50 State Quarters Program which the U.S. Mint has started. For each, please respond "TRUE" if, to the best of your knowledge, it accurately describes the program or "FALSE" if it does not accurately describe the program. [READ LIST] [SELECT ONE FOR EACH ROW]

Statement		
a. The new quarters will be produced in the order in which states joined the union.	1	2
b. The United States Mint will produce a limited number of each new quarter.	1	2
c. The United States Mint will produce a new quarter every month for the next few years until a quarter has been produced for each state.	1	2
d. The new quarters will have a higher silver content than the old quarters.	1	2
e. The United States Mint will produce five new quarters a year beginning in 1999 and ending in 2008.	1	2
f. Each quarter will be minted for only ten weeks and then will never be minted again.	1	2

7. Have you saved, put aside, or collected any of the state quarters? [SELECT ONE]

Yes	1
No	2

[IF "NO" IN Q7, SKIP TO Q10]

8. About how many state quarters, in total, have you saved or collected? Would your best estimate be: [READ LIST] [SELECT ONE]

State Quarters Collected	
a. Less than 10,	1
b. 10 to less than 25,	2
c. 25 to less than 50,	3
d. 50 to less than 100, or	4
e. 100 or more?	5

9. For each statement that describes how you may have obtained the state quarters in your collection, please respond "Yes" if it accurately describes how you have obtained some of your state quarters or "No" if it does not apply to you. [READ LIST] [SELECT ONE FOR EACH ROW]

Statement		
a. I have collected some of my state quarters from pocket change.	1	2
b. I have collected some state quarters by getting them from the bank.	1	2
c. I have purchased some state quarters that were in special packaging/ never in circulation.	1	2
d. I have received some state quarters as gifts.	1	2

10. Which of the following four statements best describes your plans for saving or collecting state quarters in the future? [READ LIST] [SELECT ONE]

Statement	
a. I do not plan to collect any state quarters in the future	1
b. I will collect quarters from a few states that interest me	2
c. I will collect one quarter from each state	3
d. I will collect more than one quarter from each state	4

[IF LEVEL "A" IS SELECTED IN Q10, SKIP TO LOGIC FOR Q12]

11. About what percentage of the state quarters that you plan to collect will consist of coins that you will purchase that have never been in circulation? Please provide a number between 0 and 100, where 0 means that none of the state quarters in your collection will be purchased and 100 means that all of the state quarters in your collection will be purchased. [INSERT A NUMBER BETWEEN 0 AND 100]

% Purchased

Attitudes toward Buying U.S. Mint Products

12. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3] [ORDER LEVELS AS IN S3] Which of the following organizations would you think of first for buying coins for yourself? [READ LIST] How about for a gift for children? [READ LIST] And, finally, which organization would you think of first for buying coins as a gift for adults? [READ LIST] [SELECT ONE FOR EACH COLUMN]

Organization Thought of First			
Adult	Child	Self	
1	1	1	a. The United States Mint
2	2	2	b. The Franklin Mint
3	3	3	c. Regional or Local Coin Dealers
4	4	4	d. Home Shopping Network, QVC, or other TV shopping programs
5	5	5	e. Unicover Corporation
6	6	6	f. The American Historic Society
7	7	7	g. eBay or other Internet auction sites
8	8	8	h. Companies offering coins in direct mail/newspaper/magazine ads

13. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3] [ORDER LEVELS AS IN S3] Please rate each of the following organizations in terms of the authenticity of their coin products on a scale of "1" to "6" where "1" means their products are "not at all authentic or genuine" and "6" means their products are "absolutely authentic or genuine." [READ LIST] [INSERT A NUMBER BETWEEN 1 AND 6]

Authenticity of Coin Products		Rating
	a. The United States Mint	
	b. The Franklin Mint	
	c. Regional or Local Coin Dealers	
	d. Home Shopping Network, QVC, or other TV shopping programs	
	e. Unicover Corporation	
	f. The American Historic Society	
	g. eBay or other Internet auction sites	
	h. Companies offering coins in direct mail/newspaper/magazine ads	

14. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3] [ORDER LEVELS AS IN S3] How about the investment potential of their coin products on a scale of "1" to "6" where "1" means their products are "not a sound investment at all" and "6" means their products are "a very sound investment." [READ LIST] [INSERT A NUMBER BETWEEN 1 AND 6]

Investment Potential of Coin Products	
a. The United States Mint	
b. The Franklin Mint	
c. Regional or Local Coin Dealers	
d. Home Shopping Network, QVC, or other TV shopping programs	
e. Unicover Corporation	
f. The American Historic Society	
g. eBay or other Internet auction sites	
h. Companies offering coins in direct mail/newspaper/magazine ads	
Rating	

15. [ASK FOR FIRST TWO LEVELS AND THIRD ORGANIZATION SELECTED IN S3] [ORDER LEVELS AS IN S3] How about the educational value of their coin products on a scale of "1" to "6" where "1" means their products are "not educational at all" and "6" means their products are "highly educational." [READ LIST] [INSERT A NUMBER BETWEEN 1 AND 6]

Educational Value of Coin Products	
a. The United States Mint	
b. The Franklin Mint	
c. Regional or Local Coin Dealers	
d. Home Shopping Network, QVC, or other TV shopping programs	
e. Unicover Corporation	
f. The American Historic Society	
g. eBay or other Internet auction sites	
h. Companies offering coins in direct mail/newspaper/magazine ads	
Rating	

[SKIP TO LOGIC FOR Q17a AND Q17b IF IN S3 "YES" WAS GIVEN TO LEVELS "A" AND "B" AND THIRD ORGANIZATION SHOWN IN Q1]

16. [ASK FOR LEVEL "A" IF S3 IS "NO" FOR U.S. MINT; ASK FOR LEVEL "B" IF S3 IS "NO" FOR FRANKLIN MINT; ASK FOR THIRD ORGANIZATION SHOWN IN Q1 IF S3 IS "NO" FOR THAT ORGANIZATION] [IF MORE THAN ONE LEVEL IS ASKED ABOUT, THEN ORDER AS IN S3] Have you ever purchased coins from [READ 1st ITEM]? Have you ever purchased coins from [READ 2nd ITEM]? from [READ 2nd ITEM]?

Even Purchased Coins		
	Yes	No
a. The United States Mint	1	2
b. The Franklin Mint	1	2
c. Regional or Local Coin Dealers	1	2
d. Home Shopping Network, QVC, or other TV shopping programs	1	2
e. Unicover Corporation	1	2
f. The American Historic Society	1	2
g. eBay or other Internet auction sites	1	2
h. Companies offering coins in direct mail/newspaper/magazine ads	1	2

[ASK QUESTION Q17a BEFORE Q17b IF U.S. MINT WAS ASKED FIRST IN S3;
ASK QUESTION Q17a AFTER Q17b IF U.S. MINT WAS ASKED SECOND IN S3]

- 17a. [ASK Q17a IF "YES" SELECTED FOR LEVEL "A" IN S3] Please consider how much you spent on U.S. Mint coins and coin-related products in the last 12 months. Do you expect your spending on U.S. Mint products to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	Decrease	Same
1	2	3

- 17b. [ASK Q17b IF "YES" SELECTED FOR LEVEL "B" IN S3] Please consider how much you spent on Franklin Mint products in the last 12 months. Do you expect your spending on Franklin Mint products to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	Decrease	Same
1	2	3

[FOR Q17C - Q17H: ASK FOR THIRD ORGANIZATION SELECTED IN S3, SKIP ALL OTHER ORGANIZATIONS]

17c. [ASK Q17c IF "YES" SELECTED FOR LEVEL "C" IN S3] Please consider how much you spent on products from regional or local coin dealers in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

17d. [ASK Q17d IF "YES" SELECTED FOR LEVEL "D" IN S3] Please consider how much you spent on products from Home Shopping Network, QVC, or other TV shopping programs in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

17e. [ASK Q17e IF "YES" SELECTED FOR LEVEL "E" IN S3] Please consider how much you spent on products from Unifover corporation in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

17f. [ASK Q17f IF "YES" SELECTED FOR LEVEL "F" IN S3] Please consider how much you spent on products from the American Historic Society in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

17g. [ASK Q17g IF "YES" SELECTED FOR LEVEL "G" IN S3] Please consider how much you spent on products from eBay or other Internet auction sites in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

17h. [ASK Q17h IF "YES" SELECTED FOR LEVEL "H" IN S3] Please consider how much you spent on products from companies offering coins in direct mail/newspaper/magazine ads in the last 12 months. Do you expect your spending to increase, decrease, or be about the same during the next 12 months? [SELECT ONE]

Increase	1
Decrease	2
Same	3

United States Mint
Post-Assessment Survey for "Genuine United States Mint" Advertising Program
August 2003

18. Which of the following coins or coin-related products would you seriously consider purchasing during the next 12 months? Please respond "Yes" if you would seriously consider purchasing it during the next 12 months and "No" if you would not seriously consider purchasing it. [READ LIST] [SELECT ONE FOR EACH ROW]

Coin or Coin-Related Product			
		Yes	No
a.	Official U.S. Mint coin sets, such as proof sets, uncirculated sets, and silver proof sets	1	2
b.	Official U.S. Mint commemorative coins, such as for the 2002 Winter Olympics and the West Point Bicentennial	1	2
c.	Quarters from the U.S. Mint 50 State Quarters Program	1	2
d.	Other new or recently minted U.S. coins, such as the American Eagle and Golden Dollar	1	2
e.	Antique U.S. coins	1	2
f.	Painted or colorized U.S. coins	1	2
g.	Official new or recently minted foreign coins	1	2
h.	Antique foreign coins	1	2
i.	Thematic commemorative coins or medallions, such as Coins of Old Nations or Coins of the Great Explorers	1	2
j.	Coin jewelry and other coin-related gift items	1	2
k.	Books about coin collecting	1	2

19. OMITTED

Themes Related to Advertising Program

20. [RANDOMIZE SEQUENCE OF LEVELS] Next, please indicate how much you agree or disagree with each of the following statements about coin collecting, using a scale from "1" to "6", where "1" means "Strongly Disagree" with the statement and "6" means "Strongly Agree." [INSERT A NUMBER BETWEEN 1 AND 6]

Statement	Rating
a. My own interest in collecting coins is on the rise.	
b. Coin collecting is becoming more appealing to younger people.	
c. Collecting coins can bring the whole family together.	
d. Collecting coins is a good financial investment.	
e. Coins from the U.S. Mint make great gifts.	
f. Coin collecting is a fun way to pass the time.	
g. The best coins worth collecting are official U.S. coins.	
h. A coin collection is something significant to pass on to children or grandchildren.	
i. Coins are great ideas for holiday gifts.	
j. Coins are works of art, like paintings or sculpture.	

21a1. Do you recall having heard or seen any advertisements for the U. S. Mint during the last six months? [SELECT ONE]

Yes	1
No	2

21b1. Do you recall having heard or seen any advertisements for the Franklin Mint during the last six months? [SELECT ONE]

Yes	1
No	2

21a2. [ASK IF Q21a1 IS "YES"; RANDOMIZE LEVELS] Please respond "Yes" if you recall having seen or heard a U.S. Mint advertisement from each source during the last six months or "No" if you do not recall having seen or heard a U.S. Mint advertisement. [RECORD RESPONSE IN COLUMN Q21a2] [ASK IF Q21b1 IS "YES"] How about for the Franklin Mint? [RECORD RESPONSE IN COLUMN Q21b2] [SELECT ONE FOR EACH ROW FOR EACH QUESTION]

U.S. Mint	Q21a2	Yes	No	Yes	No
Franklin Mint	Q21b2	Yes	No	Yes	No
				a. Network television (e.g., ABC, CBS, NBC)?	1
				b. Cable television (e.g., A&E, the Learning Channel and the like)?	1
				c. Newspaper?	1
				d. Magazine?	1
				e. Radio?	1
				f. The Internet?	1

21a3. [ASK IF Q21a2 IS "YES" FOR LEVEL A AND/OR LEVEL B FOR US MINT] On what specific [Network and/or Cable] television stations/channels do you recall seeing an advertisement for the U.S. Mint in the last six months? [SELECT ALL THAT ARE MENTIONED]

Saw U.S. Mint Ad	
a. ABC	1
b. NBC	2
c. CBS	3
d. BET	4
e. A&E	5
f. AMC	6
g. CNN	7
h. Discovery	8
i. Fox News	9
j. Fox	10
k. History	11
l. Lifetime	12
m. TLC	13
n. Univision	14
o. Don't know which station	99
p. Other (Specify) _____	0

21a4. [ASK IF Q21a2 IS "YES" FOR LEVEL D FOR US MINT] In what specific magazines do you recall seeing an advertisement for the U.S. Mint in the last six months? [DO NOT READ] [SELECT ALL THAT ARE MENTIONED]

Saw U.S. Mint Ad	
a. Baby Talk	1
b. Better Homes & Garden	2
c. Family Circle	3
d. Ladies' Home Journal	4
e. Military Times	5
f. Newsweek	6
g. Parents	7
h. Reader's Digest	8
i. Time	9
j. Women's Day	10
k. Don't know which magazine	99

21a5. [ASK IF Q21a2 IS "YES" FOR ANY LEVEL FOR US MINT] [RANDOMIZE LEVELS] To the best of your recollection which of the following statements describes the major theme(s) of the U.S. Mint advertisements you heard or saw in the last six months. [The U.S. Mint advertisement was primarily about... [READ] [SELECT ONE RESPONSE FOR EACH]

Advertisement Theme		
a. Coins as birthday gifts or for a baby's birth	1	2
b. Liberty for all/Liberty, freedom and American history	1	2
c. U.S. coins being like the coins of ancient Greece	1	2
d. Sharing coin collecting from generation to generation	1	2
e. Collect America	1	2
f. Worth a mint	1	2
g. Something else (specify)	1	2

21a6. [ASK IF Q21a1 IS "YES"] Did you make a purchase from the U.S. Mint as a result of the advertising you heard or saw in the last six months? [SELECT ONE]

Yes	1
No	2

21a7. [ASK IF Q21a6 IS "YES"] How did you place the order for that purchase? [READ] [SELECT ONE]

Order method	
a. By mail	1
b. By phone	2
c. By fax	3
d. By the Internet	4

21a8. [ASK IF S3 LEVEL "A" = "YES" AND Q21a1 IS "NO" OR IF S3 LEVEL "A" = "YES" AND Q21a6 IS "NO"] How did you place the order for your most recent purchase from the U.S. Mint? [READ] [SELECT ONE]

Order method	
a. By mail	1
b. By phone	2
c. By fax	3
d. By the Internet	4

Demographics

22. [RANDOMIZE LEVELS] How often, if at all, do you watch the following types of television programs? Please respond to each program using "a lot," "a little," or "not at all". [SELECT ONE FOR EACH ROW]

Program	A Lot	A Little	Not At All
a. Educational or documentary programs	1	2	3
b. Game shows	1	2	3
c. Dramatic series	1	2	3
d. News	1	2	3
e. Movies	1	2	3
f. Sitcoms	1	2	3
g. Sports	1	2	3
h. Talk shows	1	2	3

23. Do you have access to cable channels on TV? [SELECT ONE]

Yes	1
No	2

[IF Q23 IS "NO" THEN SKIP TO Q25]

24. [RANDOMIZE LEVELS] How about the following TV cable channels? Do you watch "a lot," "a little," or "not at all". [SELECT ONE FOR EACH ROW]

Program	A Lot	A Little	Not At All
a. Lifetime	1	2	3
b. Fox Family Channel	1	2	3
c. Discovery Channel	1	2	3
d. The Learning Channel	1	2	3
e. A & E	1	2	3
f. The History Channel	1	2	3
g. TBS, TNT or other general entertainment stations	1	2	3
h. Home and Garden Television	1	2	3
i. The Food Network	1	2	3

25. Do you listen to the radio weekdays, weekends, both or neither? [SELECT ONE]

Time of week	
a. Weekdays,	1
b. Weekends,	2
c. Both, or	3
d. Neither?	4

26. [IF NEITHER SKIP TO Q.27] At what time of day do you listen to the radio? [READ LIST] [SELECT ALL THAT APPLY]

Time of Day		
a. Early morning?	1	2
b. Late morning or afternoon?	1	2
c. Early Evening?	1	2
d. Late Evening?	1	2

27. [RANDOMIZE LEVELS] How often, if at all, do you read the following types of magazines or periodicals? Please respond to each type of magazine using "a lot," "a little," or "not at all". [SELECT ONE FOR EACH ROW]

Magazine			
	A Lot	A Little	Not At All
a. Automotive	1	2	3
b. Business or Personal Finance	1	2	3
c. Hobbies or Collecting	1	2	3
d. Educational, Science, or Nature	1	2	3
e. Entertainment	1	2	3
f. Fashion	1	2	3
g. Home and Garden	1	2	3
h. News	1	2	3
i. Sports	1	2	3
j. Family or Parenting	1	2	3
k. Popular Culture	1	2	3

28. [RANDOMIZE LEVELS] Which of the following types of newspapers do you read on a regular basis? [SELECT ONE FOR EACH ROW]

Newspaper	Yes	No
a. National newspapers like USA Today	1	2
b. State, regional or metropolitan daily newspapers	1	2
c. State, regional or metropolitan Sunday newspapers	1	2
d. Town, county or other local weekly newspapers	1	2
e. Business newspapers like the Wall Street Journal	1	2

29. Do you have access to the Internet from home or at work?

Yes	No
1	2

[IF Q29 IS "NO", "DON'T KNOW", OR "REFUSED" THEN SKIP TO INSTRUCTIONS BEFORE Q35]

30. [RANDOMIZE LEVELS] How often, if at all, do you visit the following Websites? Please respond to each Website using "a lot," "a little," or "not at all". [SELECT ONE FOR EACH ROW]

Websites	A Lot	A Little	Not At All
a. News sites like CNN	1	2	3
b. E-Bay	1	2	3
c. Amazon.com	1	2	3
d. Yahoo	1	2	3
e. Government websites	1	2	3
f. Websites of retail stores	1	2	3
g. Financial sites	1	2	3
h. The United States Mint Website	1	2	3
i. The Franklin Mint Website	1	2	3

31. [ASK IF LEVEL "H" IS "A LOT" OR "A LITTLE" IN Q30] And have you visited the U.S. Mint's Website for children, called "H.L.P. Pocket Change?" [SELECT ONE]

Yes	1
No	2
Don't Know	3

32. [ASK IF Q31 IS "NO" OR "DON'T KNOW"] Have you heard about the "H.L.P. Pocket Change" Website? [SELECT ONE]

Yes	1
No	2
Don't Know	3

33. [ASK IF LEVEL "H" IS "A LOT" OR "A LITTLE" IN Q30; RANDOMIZE LEVELS] Have you ever used the United States Mint Website for: [IF NECESSARY: ANSWER "YES" OR "NO" TO EACH ITEM THAT I READ] RECORD RESPONSE IN COLUMN Q33 [ASK IF LEVEL "H" IS "A LOT" OR "A LITTLE" IN Q30] How about for the Franklin Mint? [RECORD RESPONSE IN COLUMN Q34] [SELECT ONE FOR EACH ROW FOR EACH QUESTION]

U.S. Mint Q33		Franklin Mint Q34	
Web Usage			
a. Purchasing their products	1	2	1
b. Browsing their products	1	2	1
c. Obtaining information about their products	1	2	1
d. Obtaining information about their operations or history	1	2	1
e. Obtaining information about coin collecting	1	2	1
f. Obtaining educational information about coins for children	1	2	1

[READ] My last few questions are for classification purposes only; your answers will be held in strict confidence.

35. What is your age? [INSERT A NUMBER BETWEEN 1 AND 100]

Age

36. Which of the following best describes your highest level of education? Please stop me when I get to the right category. [READ LIST] [SELECT ONE]

Education Level		Level Attained
a.	Grade school	1
b.	Some high school	2
c.	High school graduate	3
d.	Some college, but no degree	4
e.	Vocational training or 2-year college	5
f.	4-year college graduate	6
g.	Post-graduate training/degree	7

37. Do you have any children under age 18 currently living in your household? [SELECT ONE]

Yes	1
No	2

[IF Q37 IS "NO" THEN SKIP TO Q39]

38. Are any of these children in the following age or school ranges? Please answer "Yes" or "No" after I read each item.

Child School/Age Range			Yes	No
a.	Newborn to three years		1	2
b.	Preschool or kindergarten		1	2
c.	Grade school		1	2
d.	High school		1	2

39. Do you have any grandchildren? [SELECT ONE]

Yes	1
No	2

[IF Q39 IS "NO" THEN SKIP TO Q41]

40. Are any of these grandchildren in the following age or school ranges? Please answer "Yes" or "No" after I read each item. [SELECT ONE FOR EACH ROW]

Grandchild School/Age Range		
a. Newborn to three years	1	2
b. Preschool or kindergarten	1	2
c. Grade school	1	2
d. High school	1	2

41. Which of the following best describes your current employment status?

Employment Status	
a. Employed full-time	1
b. Employed part-time	2
c. Retired	3
d. Not employed or student	4

42. Which of the following categories best describes your total annual household income, before taxes, in 2002? Your best estimate is fine. Please stop me when I get to the right category. [READ LIST] [SELECT ONE]

2002 Household Income	
a. Less than \$10,000	1
b. \$10,000 to less than \$20,000	2
c. \$20,000 to less than \$30,000	3
d. \$30,000 to less than \$40,000	4
e. \$40,000 to less than \$50,000	5
f. \$50,000 to less than \$75,000	6
g. \$75,000 to less than \$100,000	7
h. \$100,000 or more	8

43. I have one final question. We may be following up with some individuals as part of our research. Would you be willing to participate in further research on the same topic during the next six months to a year? You are not obligated to participate in any further research. And the \$10 we are giving you for the present survey will not be affected by your answer. [SELECT ONE]

Yes	1
No	2

[CLOSING] Thank you very much for your participation in this research! We are required by law to report to you the OMB Control Number for this public information survey. That number is OMB # 1525-0012-29.

44. Could you please tell me your name and address so that we can send you your \$10 check.

NAME:
STREET ADDRESS:
CITY:
STATE:
ZIP CODE:

Thank you again, and have a good day!

45. [DO NOT READ: FILL IN GENDER OF RESPONDENT]

Male	1
Female	2